

THE ROAD TO REPATRIATION: IMPLICATIONS FOR HR POLICY AND PRACTICE

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Author's declaration

Doctor of Business Administration: Portsmouth Business School.

“Whilst registered as a candidate for the above degree, I have not been registered for any other research award. The results and conclusions embodied in this thesis are the work of the named candidate and have not been submitted for any other academic award.”

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Abstract

This thesis addresses an existing gap in the academic and practitioner knowledge of the repatriation process of international assignees. The study highlights the disparity between intended HR policy and implemented HR practices within the banking sector across Europe, USA and Asia. Repatriates are defined as an employee who has returned home after spending more than six months abroad (Linehan & Scullion, 2002: 650).

The major contribution of this research is developing existing theory; previous research has focused upon readjustment and knowledge transfer of repatriates (Black et al, 1991; Bossard & Peterson, 2005; Brewster & Suutari, 2003; Sanchez Vidal et al, 2007). This study contributes to academic knowledge through an enhanced understanding and identification of how the repatriation process works and is perceived by the various stakeholders including repatriates, Human Resource Business Partners, International Human Resources and line managers.

The methods utilised generated data via in-depth semi-structured interviews in order to gain insights into how the repatriates perceived the process as well as interviews with HRBPs, IHR function and line managers. The data was then analysed using Interpretative Phenomenological Analysis (IPA).

The findings highlight that the objectives for an assignment are not evaluated. Thus currently there is no provision to define success from the organisation's point of view. Additionally, the research indicates that there are numerous lost opportunities to gather information about the newly acquired skills and knowledge of the repatriate. The poor repatriation process and implementation of policy clearly impact upon the perception from each of the stakeholders' view of whether an assignment has been successful.

Consequently the research strives to present a more inclusive look at the effect of the company's HR policy and practices and how this impacts upon the repatriation process. The results of the study highlight the opportunity for HR to add transformational practices to facilitate an improved repatriation experience for not only the repatriates but also in identifying the additional stakeholders' experience. The contribution to existing

knowledge provides additional opportunities for further research to investigate variables beyond the traditional organisation and repatriate perspective highlighting further areas for future research into multiple stakeholders.

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List of Abbreviations

AC	Affective Commitment
CIPD	Chartered Institute of Personnel and Development
CPD	Continuing Professional Development
DBA	Doctorate Business Administration
ESRC	Economic and Social Research Council
FIW	Family interference in work
HRBP	Human Resource Business Partner
HRM	Human Resource Management
IHRM	International Human Resource Management
IPA	Interpretative Phenomenological Analysis
LM	Line Manager
NRES	National Research Ethics Service
PDW	Personal Development Workshop
PwC	PricewaterhouseCoopers
SC	Social Constructionism
SCCT	Social Cognitive Career Theory
SIE	Self initiated expatriate
URT	Uncertainty Reduction Theory
WIF	Work Interference with family

Chapter 1: Introduction

1. Introduction

1.1. Background context for research

International assignments have been the topic of research for more than two decades (Bijorkman & Stahl, 2007). Expatriates for the purposes of this thesis are defined as ‘those employees working in a foreign subsidiary of a multinational company for a defined period of time’ (Harzing, 2001: 452). Whilst the areas of cultural adjustment and knowledge transfer of expatriates are widely researched, the specific area of repatriation has had moderate attention so far. Repatriation is defined as an employee who has returned home after a spending more than six months abroad (Linehan & Scullion, 2002: 650). Some academics have addressed the effects of reverse cultural adjustment and knowledge transfer to the home organisation (Bonache, Brewster & Suutari, 2001; Lazarova & Tarique, 2005).

The academic interest in international assignments is related to the costs of expatriates which according to PricewaterhouseCoopers’ 2006 survey amount to an organisations investing \$311,000 per annum per assignment. On average the cost to the organisation \$300,000 to \$1,000,000 per year for a full expatriate package presents a considerable investment for the organisation (Black & Gregersen, 2007). By combining the investment figures against retention rates, it was found that the loss of returned assignees is costing one organisation as much as \$25 million per annum (PwC, 2006a). It is important to include these figures as this data represents one of the largest sources of information regarding international assignments globally. The key trends survey encompasses 203 companies with a combined internationally mobile workforce of over 35,000 people.

Particular attention to the issue of retention upon repatriation has started to come to the fore, recent research highlights that 40 - 50 percent of expatriates leave their organisation within 12 months of return (Baruch et al, 2002; Black & Gregersen, 2007; Gribben 2006). Gregersen (1992) notes that multinational organisations, during repatriation, need to improve their expatriates’ commitment to the home organisation to improve retention of an expensive resource.

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In order to gain competitive advantage within the global market it is argued that individual knowledge and experience contributes to the process of internationalisation of organisations (Vidal, Valle & Aragon, 2007: 1272). An inadequate repatriation process and practice can lead to significant human resource management issues such as the loss of knowledgeable workers and associated additional recruitment costs, as well as demotivating existing workers and potential international assignees, thus affecting the company's successful internationalisation (MacDonald & Arthur, 2003:3).

1.1.2 Why consider repatriation issues?

Data gathered from PricewaterhouseCoopers (PwC) indicates that international assignments were set to rise during the period 2004-2007 (PwC, 2005). The implication is that more people than ever are required to work in a country that is not their ordinary permanent home. With increased international assignments, the focus of an assignment meeting the initial objectives such as staff development; transferring knowledge etc. becomes more significant in each of the phases of an assignment. The starting point for an expatriate is their recruitment and selection, once on assignment there will be various ongoing activities supported by HR such as appraisals, leading to the final repatriation of the assignee. Turnover of repatriates is reported to be 40% during the first year of return; this is in contrast to expected turnover rates of 10% per annum (PwC, 2006b). The main question regarding repatriation undoubtedly relates to the costs of unsuccessful repatriation for both the organisation and the individual. From the organisations point of view the cost of losing the assignee to a competitor and the replacement cost is the central focus and for the individual costs such as loss of work upon return and psychological health are paramount (Forster 1997). Organisational commitment after repatriation is crucial because of the positive relationship between commitment and retention and the high turnover rate of repatriated employees (Gregersen & Black, 1996).

The starting point for this research stems from the rationale for using international assignments. Therefore the reasons for international assignments are explored. In addition the management of effective assignments is discussed to highlight the requirement for an effective repatriation process. Furthermore, identifying the possible

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stakeholders involved in managing the repatriation process is discussed. In addition recruitment and selection of international assignees is considered. The practitioner context is presented to highlight the link between academic research and practice. This leads to the overall research question and objectives of the research.

1.2 Reasons for international assignments

There are three key reasons expatriates are used within an organisation identified in current International Human Resource Management (IHRM) literature: to fill a vacant position; to develop global competences in the management team; and finally to acquire and transfer knowledge within a foreign subsidiary (Dowling, Festing & Engle, 2008:89; Dowling & Welch, 2004; Lazarova & Tarique, 2005; Vance 2005). These will now be examined.

Exploring the first reason seems somewhat straightforward; the company has a position and will look within the organisation to fill the position, either locally or via an international assignment (Bonache, Brewster & Suutari, 2007; Sparrow, 2007). However, a survey from PwC (2006) highlights the growing difficulty of filling positions within the organisation due to a lack of available internal candidate. Therefore, the choice of candidate may not be dependent on their development potential or as a reward for the soon to be expatriate, it may just be due to availability. Indeed an additional reason for sending an individual on assignment could be a means to get them out of the way due to performance issues (Black & Gregersen, 2007; 120), thus casting doubt regarding the suitability of the chosen candidate.

The second reason, to develop management, requires transferring staff to another part of the organisation. As such they are expected to develop themselves as well as transfer corporate values and knowledge to the overseas location. An array of assignments can be used such as short-term, long term etc. for the assignment dependent upon the need of the individual. Staff can be transferred from headquarters to a subsidiary or vice versa or to another subsidiary operation (Dowling et al, 2008:89).

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The final reason is to develop the organisation. This latter reason seeks to operate at a strategic level to transfer knowledge, competence, procedures and practices into several locations in order to utilise global opportunities. Whichever reason is chosen for an assignment consideration as to how the assignment is managed is central to the discussion (Lazarova & Cerdin, 2007).

1.2.1 Managing international assignments

Black & Gregersen (2007:120) suggest that companies are judged on how effectively they manage international assignments and those that are deemed successful follow three general practices linked to the company's long term strategy:

1. Focus on knowledge creation and global leadership development.
2. Assign posts to those that are not only technically able, but equally judged as cross culturally able.
3. Expatriate assignments end with a deliberate repatriation process.

Managing effective assignments involves a process that involves either, creating and transferring knowledge (Bonache & Brewster, 2001; Riusala & Suutari, 2004) or developing global leadership competencies (Caliguri, 2006b; Suutari, 2002) or indeed a combination of both are seen to be far more effective (Black & Gregersen, 2007). Thus suggesting alignment between the reason for the assignment and the way it is managed.

The second reason noted was to focus upon the technical competence of the individual (Anderson, 2005; Shaffer, Harrison, Gregersen, Black & Ferzandi, 2006). In addition to their technical competence Black and Gregersen's research (2007) found that similar characteristics are looked for when considering individual's suitability for an assignment. Expatriates who are proactive in communicating with people from different cultures in their work context technically and equally socially are seen to be more successful within an expatriation. Therefore exploring the candidates' ability to cope in another culture is equally as important as their technical ability.

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The final strategy to effectively manage an international assignment involves a deliberate repatriation process (Jasswalla, Connolly & Slojkowski, 2004; MacDonald & Arthur, 2005; Paik, Segaud & Malinowski, 2002). This process would require the skills and knowledge acquired on assignment in conjunction with positions available in the home location to be appropriately noted in order to assist with future career planning. According to Black and Gregersen's research the HR function and line manager are expected to lead the repatriation process with the repatriate. Part of this process would entail debriefing the repatriate via an outsourced function (2007: 127). An outsourced function, based in the same country, involves administering parts of the HR function such as arranging removals, briefing assignees before their assignment etc to a third party (Sparrow & Braun, 2007). This deliberate management of the process is where the HR function can add value to the overall strategy of the business by supporting the repatriation activities.

1.2.2 Resourcing international assignments – recruitment and selection

Arguably the plethora of issues begins with recruitment and selection for the expatriate position. Internal recruitment is more often than not the first logical place to resource the position as the main role of the expatriate is likely to involve transferring knowledge to the host organisation (Bonache & Fernandez, 2007:108). However, the process can be far less rigid than that of recruitment for an external candidate. Harris and Brewster's (1999:492) review into recruitment and selection of expatriates highlight the extensive use of personal recommendation by line managers. Thus the interview process is diluted, not following the same external process and the focus for the line manager and assignee is negotiating terms of the expatriates' assignment. Therefore, informal recruitment and latterly the selection process can become the norm (Harris & Brewster, 1999).

It is arguable, based on Harris and Brewster's review (1999) and the widespread devolvment of HR activities transferred to line managers (Dowling et al, 2008), that the home or host line manager who has a vested interest in their new position, will be at the forefront of the co-ordination of the assignment. The host or home line manager may have little experience of the management of international assignments (Suutari &

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Brewster 2003) which Black and Gregersen (2007) report is key to effectively managing the expatriate process. Thus the home or host line manager may have little awareness of international HR policies, compensation packages and support available to the assignee (Black & Gregersen, 2007). At this early selection stage, it is unlikely that the line manager has considered any other issues that may potentially affect the assignee's decision to undertake an international assignment thus leading the author to consider; does the assignee have a family? Will they accompany the assignee? Will the family want to go? More importantly, will the candidate want to go?

1.2.3 HR's Role within the assignment process.

The HR department can add value and provide a co-ordinated approach to the activities that will assist the assignee and their family to pursue an international assignment (Bossard & Peterson 2005, Lazarova & Cerdin, 2007). Thus facilitation of how the assignment is managed from initial selection to the eventual repatriation becomes central to the discussion of effective management of the international assignment. If the HR department is to provide a co-ordinated approach that will assist the assignee and their family to support the assignment, one must not forget that the HR manager may also lack experience in managing expatriates. Suutari & Brewster (2003) suggest that where the HR manager has not experienced an international assignment there is an increased chance that the process is more effective. However, research indicates that only approximately 11% of HR managers have worked abroad (Black & Gregersen, 2007:120) which may explain why line managers are often left to negotiate the assignment terms on an informal basis highlighted previously.

The central focus of previous research refers to the cultural adjustment training (Black et al 1991; Tharenou, 2003; Holopaniemi & Bjorkman, 2005) and to date there is little evidence of research into the actual HR policies and practices that support the effective management of the expatriation process including repatriation activities (Bossard & Peterson, 2005; Lazarova & Cerdin, 2007). Therefore, research into the role the HR department plays will increase our understanding of how HR can add value to the process and further our understanding of their contribution towards successful repatriation, as well as fill the existing gap within the current academic literature.

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Indeed how the HR services are provided to the organisation will impact upon the roles HR plays within the process which appears to be precluded in the literature. The management of international assignments within some multinational companies has seen a move towards an outsourced model (Williams, Howe-Walsh, Scott & Brown, 2009). Outsourced providers such as PwC; Deloitte's; Ernst and Young etc., offer administration of international assignments services from pre-departure to repatriation briefings. This work such as; costing assignments; pre and post-departure briefings; initiating shipments; work permits etc. is undertaken by HR and tax specialists who liaise with the HR function of the organisation (PwC, 2005). The outsourced provider will tailor their provision of HR activities in accordance to the organisations requirements in line with their budget. Thus core HR activities such as performance management remain within the organisation arguably providing time for HR to add further value to the business in other areas. However, as Sparrow and Braun (2007: 26) point out 'the ability to truly optimise HR process on a global scale remains to be proven.' Moreover, in order to successfully transform HR processes several factors need to be considered at the same time such as strategy, stakeholder identification and process and people transition (for a full list see Sparrow & Braun, 2007:15).

1.3 Research problem and justifications

1.3.1 Repatriation

The literature points to the action of embracing a clear process to manage repatriation (Black & Gregersen, 2007; Hyder & Lovblad, 2007). The issue of differing expectations between the assignee and the organisation is less widely discussed. Paik et al (2002) explain that discrepancies often exist between the motivations and expectations of HR managers and assignees. Whether this is related to HR managers lack of international experience requires further research. Timing of the role and negotiations were previously discussed as adjustment facets (Suutari & Valimaa 2002). Who undertakes the negotiations regarding the end of assignment activities such as identifying a return position lacks clarity within the literature (Lazarova & Cerdin 2007). If we believe that this is up to the HR function then an understanding of whether this is managed by home, host or jointly needs to be understood. In addition, it would seem more likely in times of greater devolvment of HR to line managers (Harris,

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Brewster & Sparrow, 2003:74; Purcell & Hutchinson, 2007) that the current host line manager must consider the impact upon the home manager. The overall responsibility for repatriation activities should arguably rest with the home sponsor who maintains an interest in the assignee from the outset of the assignment (Black et al, 1992; Brewster, Sparrow & Vernon, 2007; Jassawalla, Connolly & Slojowski, 2004; Lazarova & Caligiuri, 2001). However, this assumes a home sponsor has been designated throughout the assignment.

The initial theoretical framework introduces Uncertainty Reduction Theory (URT) as a key concept to furthering the research agenda into international assignments. In addition organisational commitment is noted to be important during the repatriation process in order to maintain a positive relationship to aid retention (Gregersen & Black, 1996:209). One could argue that broadening the research agenda further by the introduction of other theoretical constructs would be helpful. The introduction of social cognitive career theory widens the research agenda by contrasting the underpinning theory of Uncertainty Reduction Theory. Tharenou (2002) suggests that individuals are drawn to expatriate experiences in order to create uncertainty and thus are receptive to international work experiences. Tharenou's work contrasts from previous research that focuses upon reducing uncertainty, highlighting another perspective to understand expatriation adjustment and therefore differing receptivity to repatriation.

Whilst the focus of academic debate proposes plausible models to aid the enhancement of repatriation, there is little evidence of research to test such models (see Taveggia & Santos Nieves, 2001). Longitudinal work of Suutari and Brewster (2003) is one exception which tracks the same cohorts of expatriates from their assignment to the return home. Again the results from this study indicate many repatriates leave the organisation once repatriated thus repatriation offers a critical challenge to organisations (Bonache, Brewster, Suutari & De Saa, 2009 : 266).

1.3.2 Practitioner context

Theory and practice are inextricably linked; Ulrich et al (2009: 4) state 'Theory without practice is conjecture and is usually irrelevant. Practice without theory is idiosyncratic

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and unsustainable...the combination of theory and practice can affect those charged with and affected by HR transformation can make sustainable progress.’ Thus the link between research and practice is fundamental to further progress the way HR practices are delivered and perceived by the employees of an organisation. In terms of repatriation there are many useful theoretical contributions to further our understanding of managing the process. However, there is little empirical research to explore how these practices are perceived by the multiple actors involved with the process. In addition, utilising a combination of theories elaborating existing research can broaden our academic understanding as well as contribute to practice.

1.4 Research Question

To develop greater understanding of the repatriation process and the actors involved within the process.

1.5 Research Objectives:

To establish the current repatriation process within a selected organisation;

To identify organisational stakeholders and their perception of the repatriation process;

To critically evaluate repatriation policy and practices;

To determine the implications for the stakeholders.

1.6 Structure of Thesis

The thesis is divided into 8 chapters. This chapter provides an overview of the background of the research and reasons for undertaking the study. In addition it offers an overview of the thesis.

Chapter 2 reviews the current literature surrounding repatriates including the management of the process. The role of HR practice, policy and delivery is reviewed in order to extend the current discussion on how to improve the repatriation process. The theoretical underpinning of repatriation are discussed.

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This is followed by Chapter 3 that outlines the research design chosen and philosophical approach adopted for the study. It explains and justifies the methods chosen for the study.

Chapter 4 presents the findings of the empirical research. The chapter integrates the results of verbatim interviews with interpretation of the repatriation process.

This leads to a discussion (Chapter 5) that considers how the findings impact upon HR practices and policies.

Chapter 6 presents the main conclusions from the study. Suggestions for further research are highlighted together with the contribution to academic knowledge.

The implications for HR practitioners are discussed in Chapter 7. This leads to recommendations for improved repatriation processes.

Finally the author presents their own personal reflection on development throughout the process of research in Chapter 8. This includes a review of academic and practitioner articles published during the process.

Chapter 2: Literature Review

2. Literature review

2.1 Introduction

The first chapter introduced the reasons for undertaking an international assignment as well as discussion surrounding the resourcing including recruitment and selection of an assignee. Effective management of assignments which importantly included repatriation was reviewed in order to open the debate surrounding the role of HR within the repatriation process. The literature review will build upon the introduction to assist furthering the research agenda into the repatriation process.

Considering the effects of HR practices (and who and how these are delivered) form the central tenet of the review. The clear indication from previous research into international assignments includes the need to manage the repatriation process in order to improve retention during repatriation (Baruch et al, 2002; Hyder & Lovblad, 2007; Lazarova & Cerdin 2007). Within a dynamically changing environment from an economic and social perspective, the issues surrounding turnover are increasingly pertinent. Authors such as Caligiuri and Colakoglu (2007:399) postulate that researchers and practitioners need to consider how to integrate expatriate management within the overall HR strategy. In their study they found no evidence of alignment between general strategy and expatriate management strategies. Furthermore, they argue that future research requires greater refinement in order to understand the nature of alignment in the international HR context. Therefore developing an understanding of how the HR strategy and resulting policies are received will broaden the research agenda and further our knowledge regarding successful repatriation processes.

The literature is structured such that ‘success’ of an international assignment is explored, leading to how success for repatriation can be defined. In order to progress the research into repatriation it is important to understand the theoretical foundations for previous research. Thus the literature review will discuss Uncertainty Reduction Theory (URT) incorporating the first theoretical contributions towards international assignment adjustments. Furthermore, Black, Gregersen and Mendenhall’s (1992) repatriation framework is analysed, highlighting the many facets involved with the repatriation process. The argument for introducing differing research theories is highlighted well by

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Boselie et al (2009: 466). They suggest that new multi-level research, exploring psychological contract theory (Guest 1992) and social exchange theory (Blau, 1964), are attracting more attention. With this in mind introducing additional theoretical concepts will encompass a brief review of the psychological contract, social cognitive career theory and commitment theory whilst considering perceived organisational support as a means to investigate turnover intentions. The purpose of the research is to develop evidence based HR practices for improved repatriation that considers the effects of atypical work arrangements which typifies international assignees and exploring the multiple commitments repatriates face between the home and host location. Thus the review considers such atypical arrangements from the domestic literature in order to enhance our existing understanding of these differing work arrangements.

2.2 What are successful assignments?

With increased international assignments, the focus of success and what this means for the organisation and the individual becomes more significant in each of the phases of an assignment including the final repatriation stage. In order to explain successful international assignments, the focus has been to highlight the reasons for the high failure rates of assignments. Dowling and Welch (2004) propose that over the past two decades the main reasons assignments prematurely end comprise the following: the partner's dissatisfaction; inability of the assignee to adapt; family adjustment; differences with managerial styles; culture and language difficulties and partner's dual career issues. Failure according to Tung (1987:117) can be defined as 'the inability of an expatriate to perform effectively in a foreign country and, hence the need for the employee to be fired or recalled home' the data highlights that 30 per cent of overseas assignments within US multinationals were ill advised. The scale of the failure over the next two decades highlights little change since Tung's original research that indicates 49 per cent of repatriates leave the organisation within two years of return (Baruch et al, 2002; Black & Gregersen, 2007; Forster, 1997; Gribben, 2006; Vermond, 2001).

The focus of such failure is undoubtedly related to the costs associated with premature return as well as retention upon repatriation (Allen & Alvarez, 1998; Black &

Chapter 2: Literature Review

Gregersen, 2007; Black et al, 1992; Forster, 1997; Gribben, 2006; Vidal et al, 2007). Exploring other factors for success such as knowledge transfer (Paik et al ,2002) and performance on assignment are less widely discussed in the literature.

Returning to the domestic literature helps to explore loss of knowledge and the effect on remaining employees when an individual leaves the organisation. The consequences for those left within the organisation are harder to account for. Beckers' (1993; 392) highly influential theoretical concepts in human capital analysis, draw distinctions between general and specific training or knowledge. Thus he explains that workers with highly specific skills are less likely to quit their jobs and are the last to be laid off during economic downturns. Equally international assignments provide knowledge and experience which generates highly specific knowledge of the organisation making it less likely that they would be made redundant during economic downturns. Brewster and Suutari (2005) suggest that an assignment is one of the most effective methods to provide a learning opportunity for the organisation. In contrast to the domestic literature, repatriation is a key turning point in an employee's career as they are vulnerable to leaving the organisation at this stage (Sanchez Vidal et al, 2008). Lararova and Caliguri (2001) argue that repatriates become more marketable due to the enhanced skills they have developed during an international assignment such as language proficiency, differing management techniques and perhaps more importantly a differing global view. Thus retaining the newly acquired skills and knowledge from the repatriate after the assignment for an extended period could form part of the success criteria equally important to the individual and organisation.

Moreover success in terms of achieving the organisational aims as well as the individuals' terms for success seem less widely reported. Indeed, the scant regard for supporting activities is an indication that this area is under researched. Thus influences upon success of an assignment such as HR policies and practices as well as who and how these are delivered require further research in order to contribute to our knowledge of repatriation.

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Holopainen and Bjorkman (2005) argue that research into successful assignments should incorporate expatriate's personal characteristics and performance to broaden the research agenda, but offer no figures for failure rates. Nonetheless Forster's (1997) research suggests some worrying outcomes of repatriation for the individual and their families. He notes that one in five repatriates, the majority over the age of 50, were unemployed upon their return to the home organisation. Furthermore 63% of repatriates noted that their employment status including reduced work status had caused significant difficulties upon return, resulting in potential failure for the individual and the organisation in terms of their employment (Black, Mendenhall, & Oddou, 1991; Holopainen & Bjorkman, 2005; Tung 1987).

Perhaps the most pertinent issue is the effect upon the psychological well being of the individual. Forster argues that there is clear evidence to suggest that psychological health was found to be lower among repatriates than other domestic work groups (Forster, 1997: 428) this is supported by Tung (1987) who notes that it can lead to lower self esteem of the individual in turn this could lead the expatriate to actively seek alternative employment.

Limited research such as Stevens, Oddou, Furuya, Bird and Mendenhall, (2006: 832) does confront the problem of a definition and elaborates that success includes readjustment with the repatriate's work circumstances as well as commitment to their work and employer. Factors such as whether the assignment fulfilled any other criteria such as knowledge transfer etc. (Lararova & Caliguri 2001; Suutari & Brewster, 2003) are seldom the focus but should be considered in conjunction with the reason for the expatriation.

Successful international assignments appear to be defined as an assignment that lasts the specified length of time. In addition Kraimer and Wayne (2004:212) define success in terms of expatriate adjustment, commitment towards the host and home country and job performance. It is, however, unlikely that employee remaining with the organisation after the assignment forms part of that success criteria (Lararova & Caliguri 2001; Suutari & Brewster, 2003).

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Including repatriation in the definition of the success of an assignment is problematic. From the organisation's perspective it could be argued that should the returning assignee leave the organisation within 12 months, the assignment could be deemed a failure, as a loss of knowledge and skills is the consequence (Suutari & Brewster, 2003). However, from the individual's point of view leaving to work in another organisation could be the best possible result to their own career (Black, Gergersen & Mendenhall, 1992). Lazarova and Cerdin (2007: 422) posit that research should acknowledge that not all turnover is dysfunctional. They argue that some assignments are not of strategic importance to the organisation. Therefore sometimes assignments are used for limited-term positions. Thus success of an assignment is difficult to laterally define. Success for an assignment requires consideration of the initial objectives which should incorporate planning for repatriation. Indeed success can be defined as an assignment that develops the individual, lasts the required time and thus benefits the organisation as well as the individual.

2.3 HR practices and policies

In order to progress our understanding of the effective management of repatriation processes it is useful to explore the role of HR practices and policies and their ultimate delivery. However, as there is scant regard within the literature relating specifically to HR policy and practice for repatriation, exploring the domestic and international literature regarding HR practices and policies will be utilised to further the research agenda.

Internationalisation of organisations has led to increasing interest within the field of International Human Resources (Dowling et al 2008; Sparrow & Brewster, 2006). What remains less clear within the literature is the implication for the delivery of HR policy and practice leading to the effective management of international staff (Lazarova & Cerdin, 2007). Friedman (2007) offers a theoretical review of the implications of globalisation for HRM roles. However empirical research is less evident. One study that has added to our knowledge of the HR function specifically related to recruitment and selection conducted by Sparrow (2007) highlights the gaps between policy and practice. Sparrow (2007: 862) argues that there are variances between macro-level

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policy and what happens when the processes are converted into the perceptions of the end users e.g. the employee or HR manager.

2.3.1 HR good practice and policy?

Within the domestic literature there remains debate regarding what constitutes HR good policy and practice. Purcell argues (1999:26) that the search for best practice within HR has led to a crusade to adopt a set of HRM practices or ‘HR bundles’ as for the combined benefit of the firm and its employees. Furthermore Purcell (1999:27) suggests that if we accept that there is an universal approach to HR practice or high commitment management as noted by US authors (see Wood, 1995) then we are left to explore what practices and policies, make up this approach. Additionally Purcell notes that little research is evident to test the internal fit or effectiveness of the practices and policies. This is supported by Boselie, Brewster and Pauwee’s review of 30 years of literature (2009). They argue that there is a lack of HRM research on the following areas (Boselie et al, 2009: 465):

1. single HRM practices at the organization level, for example, with regard to the impact of performance related pay on firm performance;
2. multiple level HRM practices at the individual employee level in line with psychological contract research;
3. HRM research into practices above the organizational level – at the country, sector or size level;
4. research comparing HRM concepts, policies, and practices between national business systems;
5. multiple level research looking at the impact of HRM on employees and the aggregated effects at the organization level.

Boselie et al (2009) believe that the differing interests and perceptions of HRM practitioners, line managers, senior managers and employees create additional challenges for research. Thus, they advocate a multi-level approach to research in policy and practice.

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The lack of research to test the effectiveness of practices and policies is even more evident within the expatriate literature that appears to preclude research into HR policy and practice for international assignments (Lazarova & Cerdin, 2007). Thus, it is timely to research the area of HR practices at an organisational level by developing a greater understanding of repatriation processes and supporting HR policy.

Guest (1987:503) determined that HRM is a set of policies that are designed to maximise organisational integrations, employee commitment, flexibility and quality of work. Therefore one would expect to see an expatriate policy to outline the company's intention towards the individual and more specifically a policy to include repatriation and the tasks undertaken by the company and of the repatriate. He argues that 'HRM implies giving personnel away to line management' (Guest, 1987: 519) that creates a dilemma for HR practitioners who want to promote HR at board level but find it difficult to carry out as this involves commitment from line management. Thus any policy or practice requires the support of the line manager.

Within international assignments it is generally accepted (Black et al, 1992; PricewaterhouseCoopers, 2005) that all expatriates will undertake an assignment that will be administered under a particular policy such as a short term assignment, long term business trip etc. The policy consists of information related to the assignment such as: relocation and costs and benefits; allowances; educational assistance; resignation or dismissal; temporary accommodation; redundancy and redeployment etc. In addition the expatriate in general will have an assignment letter (Williams, Howe-Walsh, Scott and Brown, 2009: 341). However, what is less clear within the literature is the extent to which the actual practices such as repatriation allowances, assistance with housing, education, shipments etc. are perceived by the expatriate and to what extent there is flexibility towards practices adopted during repatriation. For example, family support may be more prolific for a returning assignee with a child returning to undertake examinations at school in contrast to a returning assignee with a child of nursery age. We have seen how these HR practices can provoke failure and cause assignees to return from assignment early. Indeed, how the policies and practices are perceived by repatriates forms an interesting area for further research including why some people are

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more inclined to undertake an assignment in the first place, which may affect the way they view and ultimately experience the repatriation process.

Furthering the discussion within the literature regarding HR practices and policies Boselie, Dietz and Boon (2005) discuss that best practice refers to a set of HR policies that arguably improves performance in all organisations. In contrast, the best fit approach argues that if HR policies are consistently adopted with the business strategy then performance will improve. Kinnie, Hutchinson, Purcell and Rayton (2005) studied three groups: managers, professionals and workers and found that each group demonstrated preferences for differing HR practices. Managers' commitment was associated with four HR practices. The most prevalent was linked to career opportunities with rewards and recognition, involvement, communication while work life balance was secondary in importance. Professionals also valued these practices but their main emphasis was on performance appraisal. Workers, on the other hand, valued rewards and recognition. The conclusion drawn from the study was that different HR practices are more relevant to different employee groups, thus, affecting their commitment to the organisation. Consequently, an employee's satisfaction is linked to different HR practices. This causes challenges for HR strategy to deliver a solution that fits diverse requirements. Whilst the argument to maintain a consistent HR approach is mandatory with regard to legal implications as well as from an ethical view, it becomes less clear as to whether this approach would work for all HR practices.

Within international assignments further complexity is noted by Paik et al (2002) to deliver HR practices to repatriates. For example their research found that HR managers placed high emphasis upon reintegration with the home corporate culture. In contrast the repatriates placed greater emphasis upon reintegration with the home country culture. Their findings highlight that communication with the home location is crucial in order to avoid a problematic reintegration with the home location (Paik et al, 2002: 641). They explain that discrepancies often exist between the motivations and expectations of HR managers and assignees suggesting that employee and employer expectation are not aligned.

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Extending this discussion Hailey et al state (2005:51) ‘The HR department needs to go beyond designing effective HRM policies and practices to ensure that these practices are implemented appropriately and are accepted by employees in order to achieve the intended results’. Thus the HR department and line management together have a crucial role to play in stimulating appropriate employee behaviour on behalf of the firm (Bossard & Peterson, 2005; Lazarova & Cerdin, 2007; Purcell et al 2003).

HRM performances and the role of the HR department within the Banking sector were the focus of Hailey, Farndale and Truss (2005)’s research. Their research suggests that assessing the bundles of HRM policies and practices at a time of declining commitment towards the organisation could in itself result in being perceived as a good employer. Furthermore the study questioned the strategic partnering role and that in the long term this strategic role can have a negative effect on the sustainability of high performance (Hailey et al, 2005:63). Research into the role of the HR department in the case of repatriates offers further complexity. The HR administration of an international assignment requires additional HR practices to support the expatriate noted previously (See Willams et al 2009).

Furthering our understanding, Nishi et al (2008:505) introduce the idea that employees respond attitudinally and behaviourally to HR practices. The results from their research indicate that employee’s perceptions of and reactions to HR practices vary considerably across the organisation and therefore the purpose of the practice may not achieve the intended result (Nishsi et al 2008:528). For example providing pre-departure cross cultural training may not be valued where the assignee does not see the benefit. This view is supported by a recent review that suggests the perceptions of HRM professionals, line managers and employees may differ, but also because of their differing interests (Boselie, Brewster, & Paauwe, 2009: 465).

Kinnie et al, (2005) suggest that research should seek to explore the links between actual HR practices and policies as perceived from an individual and organisational perspective. What is even more important, Kinnie et al show that for different employee groups different HR practices are important for stimulating affective commitment to the

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organization. With regard to expatriate commitment, Furuya, Stevens, Oddou, Bird and Mendenhall (2007) note that the policies and practices exerted as part of the repatriation process can only add to the perception of an assignee that the organisation does indeed value their contribution. Thus, these policies and practices can enhance expatriates' commitment towards the organisation. It is therefore vital to look into HR policies and practices when one seeks to explain repatriate commitment whilst acknowledging that the policies and practices are only as good as they are perceived.

Black et al (1992:230) argue that there are three problematic areas for the international assignee and their families with regard to repatriation adjustment: Firstly, finding a new position, secondly, communicating with home country colleagues and friends and, lastly, the general culture of the home country. Thus providing supporting practices to identify a return position upon return would address the first issue. Communication is seen as the second area of concern, assistance could be provided to facilitate home country visits during the assignment to maintain contacts with family and colleagues as well as link to the prospective return position. Finally, attention to reverse culture shock and organisational intervention to limit possible effects of culture in the home country (Black & Gregersen, 1991; Baruch & Altman, 2002).

It has long been noted that identifying better supporting practices could help to develop more grounded expectations of repatriation (e.g., Allen & Alvarez, 1998; Suutari & Brewster, 2003). Much of the research into ongoing supporting activities has focused upon the support offered by coaching and mentoring relationships (Black et al, 1992; Brewster, Sparrow & Vernon, 2007; Lazaroova & Caligiuri, 2001). During the course of the assignment the level of communication between the home country and the individual is viewed as one way of providing additional support to the expatriate, an essential element in reducing uncertainty and increasing receptivity towards an assignment. Additionally Suutari and Valimaa (2002) argue that repatriation consists of different factors influencing general adjustments that include the expatriate's age, length of assignment, timing of the negotiations, expatriation adjustment problems, and contact with home and role conflict. Thus as well as considerations as to which supporting

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practices are offered by the organisation, knowledge of the repatriate's demographic may impact upon the support required.

Furthermore, differences in culture amongst expatriates will also contribute towards the support and how this is perceived. Tung (1987:122) notes that compared to the US, Europeans are affected by the spirit of internationalism which in turn impacts upon successful HR practices. For example Tung notes that international experience is considered an important prerequisite for promotion to top management; recruitment for management level positions seeks graduates that are well travelled; management teams are heterogeneous; implication that Europeans are more adaptive to foreign ways. The implication from Tung's research is that separate department or divisions undertake and oversee the career paths of expatriates. Since this article was written it is more common to find an International HR department who do exactly this role or an outsourced provider for multinational organisations (Williams, Howe-Walsh, Scott and Brown 2009; PwC 2005).

Nonetheless, differing expectations between the assignee and the organisation also impact upon the repatriation. This might extend to non-work issues such as job assistance for the returning partner (Paik et al, 2002). These different expectations between the organisation and the individual can influence the repatriate's commitment to the organisation he/she returns to. Thus there is an argument to match expectations of HR supportive practices with the repatriate's expectation; this in part will be affected by how the practices and policy are delivered.

2.3.2 Delivery of HR policy and practice

In order to understand the gaps between HR policy and practice developing an understanding of the HR function can elicit further opportunity to highlight the potential gaps. Indeed the delivery of HR practices has changed considerably over the last 20 years aligning with the premise of HR adding value to the business (Ulrich and Waynebrock (2005:2). Arguably it is not the policy itself that adds value but what HR can do to help someone achieve their goals, this is where HR delivery then adds value to

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the business. Ulrich et al (2009:104) believe that HR has evolved during the past ten years to the following with noticeable roles for HR professionals outlined below:

- Employee Advocate – Focus on employees;
- Functional expert – Delivery of HR practices either through technology, policies, interventions etc.
- Strategic partner – This role encompasses multiple dimensions including business expert, change agent, knowledge manager and consultant.
- Leader – Leading the HR function as well as corporate governance and monitoring the HR community.

However, in order to elicit any change within the organisation's HR value to the business, Ulrich et al (2009:8) argue that HR transformation involves integration, alignment and a business focused approach to redefining how HR work is delivered within an organisation. Ultimately Ulrich et al (2009) question the rationale for HR transformation unless the transformation is aligned to the overall business plan it will not actually achieve transformation. What is less clear is the how the delivery of HR practices are analysed in terms of whether they are transformational or transactional. Is a transformational HR practice one that facilitates repatriating the international assignee or should this be considered transactional? Potentially it could be both as the repatriation may be straightforward and a return position is identified. Alternatively HR together with the line manager have to assess return positions, skills of repatriate etc in order to facilitate a return position which could be viewed as a far more transformational role. The literature lacks clarity in order to answer this level of detail.

What we do know about the delivery of IHR practices is that international assignees are supported by twice as many HR professionals (one to thirty seven) than other staff (one to seventy). One participating organisation, from PwC's recent study, has one HR professional dedicated to every fifteen expatriate workers (PwC 2006b). The high ratio is noted to be due to the nature of administering an assignment and the complexity involved with pay, tax, physical move etc. The line manager could find themselves spending the majority of their time dealing with assignment activities in conjunction

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with their main role, especially when the assignment activities are ad hoc. Therefore a good understanding of the policy and process is required to facilitate the repatriation. This leads to the question of how practical is it to expect the line to undertake repatriation activities and how much support is required from HR and indeed which role HR fulfil: that of employee advocate or functional expert or indeed a combination of all Ulrich's roles?

Who undertakes the repatriation negotiations lacks clarity within the literature. Even if it is understood that this is up to the HR function then an understanding of whether this is managed by home or host HR or even jointly needs to be clarified. In addition, it seems more likely - in times of greater devolvement of HR to line managers (Kinnie, Hutchinson, Purcell & Rayton 2005; Torka & Schyns, 2008) that the current line manager/supervisor must consider the impact of repatriation upon the home manager. Nevertheless, as we have seen, HR practices are valued differently between different groups of employees (Kinnie, et al, 2005). Thus the response to policies and practices may vary from expatriate to expatriate and equally may vary throughout the repatriation process creating challenges in delivering HR practices to deliver a successful international assignment policy.

With the increased devolvement of HR practices to line managers/supervisor (Dowling & Welch, 2004; Francis & Keegan, 2006; Perry & Kulik, 2008; Purcell & Hutchinson, 2007) and the high importance of HR practices in the expatriation process, arguably the impact of the line manager is even higher for international assignees compared to domestic employees. The line manager (home or host) is likely to be the first point of contact during the repatriation process. How the process of repatriation is initiated and who initiates it plays a significant part in the overall process. The lines of communication between home and host line manger and HR and IHR cannot be underestimated as the international assignee may require a concerted effort by both to ensure the policy runs as intended. How the repatriate experiences the repatriation process will impact upon their view of the organisation and the likelihood that the individual will stay (Hyder & Lovblad, 2007).

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Within the repatriation process it is arguable that the line manager will be the first point of contact and may subsequently stay as the co-ordinator of the assignment as more and more HR activities are devolved to the line manager (CIPD, 2007; Dowling et al, 2008; Guest 1987). This is problematic, as the line manager may have little experience of the management of international assignments, thus the question arises as to whether HR should undertake this role or support the line manager.

Lazarova and Cerdin (2007) argue that home, host and international HR teams need to coordinate their effort to find suitable positions for repatriates upon their return. However, they suggest that there is a lack of research into organisational support practices from the HR department and therefore organisational perspective. The identification and delivery of how each HR practice is experienced such as pay; training and development, future career progression is related to the repatriation process requires further research.

Arguably, devolving people management to line management could be dangerous when responsibility for specific roles is required such as employee advocate/champion. Recent research has highlighted the issue of the diminishing role of employee champion and the effects this can have upon individuals' day to day experience (Francis & Keegan, 2006; Hailey et al 2005). Line managers reported being torn between roles to carry on their daily responsibilities as well as take on HR initiatives (Hailey et al, 2005). This area within repatriation comes to the fore when repatriates are assigned to a new home manager. The home line manager's desire for the repatriate to slot back into the organisation may not consider the implications that the repatriate returning to a new position will not necessarily have the working knowledge to enable them to hit the ground running such as a new IT system, different work procedures etc. The level of support required is akin to the support offered to a new joiner to the organisation. Kidd and Smewing (2001:26) note that supervisors/line managers are increasingly important in their role to provide support for new joiners. However, would this additional support be better placed by an IHR function in the case of repatriates in light of previous research (Francis & Keegan, 2006; Hailey et al 2005) and provide an argument for the return of the employee advocate/champion role?

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2.4 Psychological contract

Regardless of who and how HR practices are delivered, Guest's survey of workers' reactions to their experience of HRM highlights that those employees experiencing more HR practices felt more secure in and more satisfied with their jobs (Guest, 1999:12). Furthermore Guest argues that this leads to a better psychological contract between the employee and the organisation. The stronger the psychological contract the higher the level of commitment the employee feels towards the organisation. The types of HR practices include; pay for performance; training and development; staff surveys; performance appraisals; provision to deal with non work responsibilities; etc. During the repatriation phase, HR practices *may* be undertaken by the line manager home or host, host or home HR and IHR or is there the potential for this to fall between them all?

A range of HR practices are reported by Guest to enhance the psychological contract (see Guest & Conway 1997; 2001). Guest and Conway (2002: 22) define the psychological contract as 'the perceptions of both parties employment relationship – organisation and individual - of the reciprocal promises and obligations implied in the relationship'. Their study explores the management of the psychological contract and the role of organisation communication. The results indicate effective communication reduces perceived breach of the psychological contract. They suggest that a deliberate range of communications are used and evaluated in order to assess their effectiveness.

In order to understand employees attitudes and behaviours researchers have often focused on social exchange theory. Blau (1964) refers to social exchange theory as the expectations that where an individual does another individual a favour, there is an expectation that the favour will be reciprocated at some stage. Reciprocity in turn has been the focus of research in order to further understanding of attitudes and behaviours. Coyle-Shapiro and Kessler (2002:70) contest that the construct of mutual obligations has progressed from mutual expectations to reciprocal obligations. They argue that consistent with research adopting a social exchange framework, the psychological contract examines employee reciprocity based on the behaviour of the organisation. The central tenet of such work has focused on the consequences of organisations' behaviour

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regarding contract fulfilment or contract breach on traditionally researched employee outcomes such as organisational commitment and organisation citizenship behaviour.

Coyle-Shapiro and Kessler (2002) believe that the psychological contract framework furthers the conceptualisation of reciprocity by differentiating between perceived organisation obligations and the fulfilment of obligations. Their research findings demonstrate that employees adjust their obligation and the fulfilment of them according to their perception of the organisations obligations. Thus, repatriates who believe a return position will be found to reflect their international assignment will expect the obligation to be met. If the obligation is not met and they return to a similar position prior to the assignment then the repatriate may adjust their own reciprocation towards the organisation leading to reduced psychological contract. Interestingly the results also highlight that the employees' fulfilment of their obligations leads to an obligation that may entail the organisation positively adjusting their perceived obligation to their employees.

Differing perceptions regarding relational versus transactional obligations from the organisation and employees perspectives have been explored previously. Research undertaken by Herriot, Manning and Kidd (1997) highlights that the organisation chose more relational categories, whereas the employees demonstrated transactional obligations were key. Herriot et al suggest that this was due to employees' lack of trust towards the organisation and the employees own job insecurity. Thus, highlighting the prevalence of a traditional input-oriented view of employee obligations. Examples were discovered of a reciprocal element to the contract. It was concluded that, despite the level of agreement between the two parties regarding the elements of the psychological contract, the issue that both parties held differing perceptions of its balance; and that organizations should only expect employee commitment if they themselves have fulfilled their side of the contract.

Extending this discussion of employee and organisational relationship is useful in the context of HR practices. Kuvvas's (2008) study highlights that the social contexts of organisations, as indicated by the quality of the employee-organisation relationship, may

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be more important in determining employees' work performance than how the HR practices are perceived (Kuvvas, 2008:20). Thus Kuvaas argues that HR practices alone cannot make up for a weak employee–organisation relationship. However, Kuvvas notes that if HR practices, especially training and career development are perceived as developmental, they can then positively influence turnover intention. Therefore an expatriate may have a weak employee-organisation relationship with the home or host organisation but the assignment is viewed positively due to its developmental nature.

Returning to the initial theoretical foundation of repatriation may offer some further insights into the repatriation process. Thus far the discussion has centred on HR practice and policy and link with psychological contract and reciprocal nature of the employment relationship. However, much of the previous research into repatriation draws upon Uncertainty Reduction Theory (URT).

2.5 Repatriation Framework

The framework stems from Uncertainty Reduction Theory. Exploring the theory, Berger and Calabrese (1975) provide a focus of reducing uncertainty by using human communication to gain knowledge about the other person. The theory proposes seven axioms (Berger & Calabrese, 1975: 102-107). The first one contends that the more you speak with another person the more likely you are to feel comfortable with that person. The second axiom refers to nonverbal communication, proposing that uncertainty reduces the more nonverbal communication takes place. Thirdly, individuals are likely to seek more information to reduce their level of uncertainty. Fourthly high levels of uncertainty in a relationship cause a decrease in the confidence level of communication content. The fifth axiom states that where there are high levels of uncertainty they are reflected by high levels of mutual exchange between individuals. Sixthly, similarity reduces the uncertainty between people conversely where there are dissimilarities the likelihood is that uncertainty levels are increased. Finally, the seventh axiom proposes that increases in uncertainty level produce decreases in liking. Thus, the axioms suggested by Berger and Calabrese define how future communication between two individuals will continue in the light of uncertainty. The more people communicate the greater the likelihood that they will form a relationship, thus reducing uncertainty. The

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theory suggests for expatriates that reducing uncertainty via training and communication will facilitate a successful assignment by enabling the assignee to establish relationship in the host country.

Building upon the initial premise of URT, Black et al (1991) argue that the literature regarding international assignments lacked a systematic approach to international adjustment (Black et al 1992: 740). Therefore, they proposed a theoretical framework based on merging domestic literature regarding adjustment to moving location as well as international literature regarding moving to another country. Black et al (199) argued that the main focus of research prior to their paper was on cross-cultural adjustment and effectiveness. However, little research had been conducted in the area of expatriation adjustment. Reviewing the domestic literature provided a broader theoretical base to understand adjustment. From the socialisation and work role adjustment literature the *mode* of adjustment is key, whereas the relocation and sense making literature focused on the *degree* of adjustment (Black et al 1991: 301). The domestic literature suggested that individuals make *anticipatory* adjustments before they actually encounter the new situation. Furthermore the importance of accurate expectations to facilitate adjustment is noted. From the international adjustment literature three categories have emerged regarding pre-departure variables important to adjustment, namely, previous experiences, pre-departure training and candidate selection. A further two variables, related to post arrival, include individual skills and non-work factors. Overall adjustment is referred to in terms of adjustment to the home culture (Black et al, 1991: 314).

Black, Gergersen & Mendehall (1992) developed a further theoretical framework specifically to address the area of repatriation adjustment. They argue that the area of repatriation offers additional challenges and that developing a systematic approach can assist with predictors of repatriation adjustment. Black and Gergesen (1991a) found that evidence to suggest that repatriation adjustment also has three related yet distinct facets: adjustment to work, adjustment to interacting with home nationals, and adjustment to the general environment and culture. Thus they suggest that repatriation adjustment is multifaceted which is important for two reasons. Firstly, an antecedent

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such as the support of co-workers could be related to one or all facets and secondly, if repatriation adjustment is multifaceted then is it possible that certain facets will be more or less strongly related to outcomes such as turnover and job performance (Black et al, 1992: 741).

The repatriation model (Black et al, 1992) is divided into two parts; pre return adjustment conducted prior to repatriation and post return adjustment. The model groups variables into: individual; job; organisational; and non work. Within each set of variables several relating factors are highlighted. Pre return adjustments include how realistic the repatriate's expectations are from an individual's perspective. Whereas organisational variables cite communication with the home location, which is clearly central to the amount of information available regarding future return positions etc. Additionally the repatriate would seek other sources of information related to non work variables again to set expectations for what it will be like to return. Post return adjustment brings together the same variables but offers discussion as to how the repatriate is likely to react to changes to their home work environment. Essentially this raises the issue of maintaining the repatriates' momentum during repatriation process to capture the enthusiasm facilitated by an assignment and lead to a positive experience of the repatriation process.

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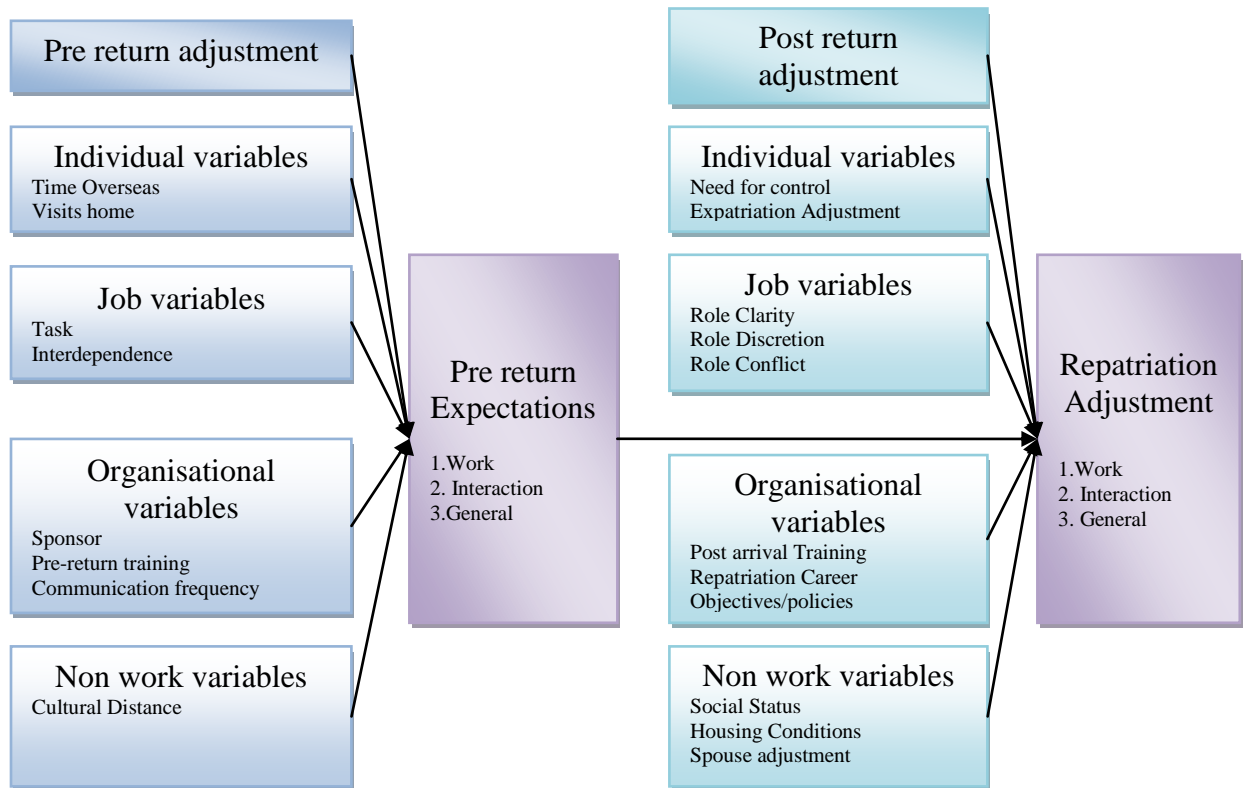


Figure 2.1 Framework of repatriation Adjustment (Black, Gregersen & Mendenhall, 1992: 745)

Drawing conclusions from the framework, leads the author to note that the more information provided to the repatriate during the different phases of repatriation the more likely the repatriate will be to adjust once repatriated. The focus is to provide organisational interventions that will help the repatriate to adjust. However, the implication of any adjustment from the organisation is not transparent, for example career planning and how the organisation makes use of the newly acquired skills and knowledge in conjunction with HR planning lacks clarity. What is also not clear from the framework is who takes responsibility for the process nor whether there should be any reciprocal adjustment from the organisation in order to assist with the repatriation. Theoretical understanding would be developed by research into the repatriation process and responsibilities for the management of the process thus contributing to academic

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knowledge. Therefore the overall research question seeks to develop greater understanding of repatriation and the actors involved within the process.

2.6 Commitment

Strong links between organisational commitment and turnover have been demonstrated in previous research (e.g., Gregersen & Black, 1996; Mowday, Porter & Steers, 1982; Stevens, et al, 2006; Sturges & Guest, 2001; Van Breugel, Van Olffen and Olie, 2005). The role of commitment has received limited attention within the expatriate literature so far. Previous research conducted by Steers (1977: 49) explored actual work experiences and job characteristics. The research highlighted that personal and job characteristics, as well as work experiences influence commitment towards the organisation. However, work experiences were found to be more closely associated with organisational commitment. Work experiences included: attitudes toward the organisation; reality of the job; feelings of personal importance and the extent to which the organisation was seen to be dependable carrying out their commitment to the employee. Job characteristics were noted as: autonomy; variety; feedback and identity.

Meyer & Allen (1991) state that job characteristics fit into actual work experiences. With respect to commitment during and after international assignments, it has to be noted that the actual work experiences are more closely related to commitment than job characteristics (Black et al, 1992). International assignments are often said to provide an employee with greater autonomy and levels of responsibility than previously experienced in the home country, as such repatriation has often been reported as an anticlimax for the returning expatriates who find themselves in a role that does not offer the same challenge potentially reducing their commitment to the home organisation (Suutari & Brewster, 2003).

Research undertaken by Gregersen and Black (1996) argues that greater organisational commitment from the assignee was found where the international experience was perceived to be valued by the organisation. Their study highlights that the organisation can influence the expatriates commitment upon repatriation by communicating that they value the international experience (Gregarson & Black, 1996:227). Thus, the

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organisation needs to ensure that the international experience is positively acknowledged in some way such as a debriefing. Meeting the expectations of the repatriate, such as valuing the experience, is the centre of research undertaken by Stroh et al (2000). They suggest that the literature does not examine the link between expectations and organisational commitment, more specifically the role of non work expectations upon repatriation is largely ignored within the literature. The results from their research indicate several inconsistencies that despite expectations not being met such as interpersonal relationships upon repatriation, the commitment towards the organisation remained high (Stroh et al, 2000: 694). However, the study does not provide the level of detail to confirm the nature of the interpersonal relationship or whether any supportive HR practices were investigated.

Further research undertaken by Stevens et al (2006: 838) suggests that HR policies and practices are central to the successful transition of the repatriate in order to support the adjustment of the repatriate in the home location. Arguably providing supportive HR practices will enhance the assignee's commitment towards the organisation such as performance management, role clarity and reward. In contrast ineffective HR practices could damage the individual's commitment (Schyns et al 2007). Thus, better performing employees, arguably the ones the organisation want to retain, are those that are proactive in seeking alternative employment should they not meet the employee's expectation (Schyns, Torka & Gossling, 2007: 673).

Schyns et al (2007; 673) argue that the line manager of the employees can influence the employees' attitude towards the organisation thus impacting upon the turnover intentions of the individual. From their study of Dutch and German workers they suggest that HRM policies and practices such as: development; pay; job characteristics; physical and social working conditions; worker voice, that meet the employees' interests will form a central part in retaining employees. Furthermore they suggest that HRM policies and practices that meet the employees' interests will form a central part in retaining employees. However, this is also dependent upon whether or not the other organisation offers equal or better opportunities. In the case of repatriates previous research (Black, MendeHall, & Oddou, 1991; Holopanienen & Bjorkman, 2005; Tung

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1987) has highlighted reduced status at work as a significant issue upon repatriation, therefore one could question whether the organisation manages to equal opportunities let alone better them.

Therefore different HR practices or antecedents will have a different impact on organizational commitment (Meyer & Allen, 1991). According to Meyer and Allen's (1991) three-component model of commitment there are three "mind sets" which can characterize an employee's commitment to the organization:

Affective Commitment: AC is defined as the employee's positive emotional attachment to the organization. An employee is committed to the organisation because they want to work there (Allen & Meyer, 1990:3).

Continuance Commitment: The individual commits to the organisation because he/she perceives high costs of losing organisational membership, including financial costs such as pension and social costs such as friendships with colleagues. The employee remains a member of the organisation because they have no choice to leave without making a loss (Allen & Meyer, 1990:3). McGee and Ford (1987) re-examined some psychometric properties of the scales developed by Meyer and Allen and found that the continuance commitment scale, two distinct dimensions were identified. The first reflected commitment based on few existing employment alternatives, and the second reflected commitment based on personal cost associated with leaving the organisation such as loss of relationships with colleagues.

Normative Commitment: The individual feels obliged towards the organisation (Allen & Meyer, 1990:3). There are many possible origins for the feelings of obligation. For example, the employee may feel obliged to the organisation as a result of formal or informal training they have received. Thus the employee feels an obligation to repay the perceived debt. In addition, there may be influences from internalized norms, already developed through family or other socialization processes, that one should be loyal to one's organisation. Therefore remaining with the organisation is the thing to do. Wiener (1982:426) suggests that the practical implication for organisations is that they

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must define their own value system, in order to get employees to accept it and to attract potential members with a compatible value system.

Meyer and Allen (1991) stress that these components of commitment are not mutually exclusive, therefore it is likely that an employee will be simultaneously committed to the organisation in an affective, normative, and continuance way, at varying degrees of intensity. Further thought to this idea led Meyer and Herscovitch (2001) to argue that at any point in time, an employee has a profile reflecting their personal commitment. Each of these mind sets may have different effects on workplace behaviour such as job performance, absenteeism, and the likelihood that employee will leave the organisation. This view is supported by Meyer, Stanley, Hersovitch and Toplonytsky (2002) meta-analysis study on organisational commitment. Their findings highlight that perceived organisational support has the strongest correlation with affective commitment. Thus, they suggest that managers interested in encouraging commitment with their workforce could look towards HRM policies and practices to further perceptions of support. This links and reinforces the view held by Gregersen and Black (1996) that the organisation has to communicate the value of the repatriate and their experience.

Allen and Meyer (1991) believe that work experiences dictate affective commitment. Torka and Schyns (In press) link this to operational HRM involving HR practices in terms of the job content, physical and social working conditions such as support from colleagues and line managers as well as training and development, reward and employee involvement. Supported by Meyer et al. (2002) they suggest that work experiences such as HR practices serve as antecedents for both affective and normative commitment. However, there is little research to develop the link between HR practices and policies and commitment within international assignments and more particularly repatriation.

Organisational commitment is not the only focus of commitment relevant in the repatriation process. Torka (2004) provides an insight into other related foci by addressing variables related to commitment towards an individual's job, department and

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colleagues. Torka's research focuses on commitment in atypical employment relationships, such as temporary workers. These alternative work relationships are based on differing commitments towards the organisation and employing agency (Connelly, Gallagher & Gilley, 2007). Similar to temporary workers, expatriates deal with two organisations: the home and the host organisation. Seemingly, the administration of HR tasks may no longer be central to home HR as host HR has taken over the administering all HR practices, furthermore some or all HR activities related to the assignment may be outsourced (Williams, Howe-Walsh, Scott & Brown, 2009: 341)

Thus based on knowledge of multiple agency and triangular employment relationships, there is the potential to develop a framework for successful repatriation HR and contribute to academic knowledge. In order not to confuse the repatriate and to give him/her a sense of support from the organisation, clear lines of responsibility regarding administration is required. HR activities may be undertaken by different HR points of contact such as: host and home HR; host and home line manager; shared HR services; international HR services; outsourced provider; or combination of any of these (Williams et al, 2009). Determining who's doing what could be a major challenge for the organisation to clarify. Arguably the host organisation should remain in control of the repatriation in order to maintain the repatriates' commitment.

Torka's study found that commitment of atypical workers depends on treatment concerning different aspects of HRM. Taking into account that temporary workers deal with two organisations, namely, the host organisation and their employing agency, the implication for the HR function of the host organisation is that they may perceive they have less responsibility since the temporary agencies will undertake recruitment and selection and rewards for temporary staff. However as Torka & Schyns (2007) argue host organizations should remain in control since negative treatment by the agency can cause spill-over effects for the host and vice versa.

But how do atypical workers and repatriates have similar scenarios? One could argue that international assignments provide another atypical work employment relationship

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due to their commitments to the home and host organisation. Furthermore, during the repatriation phase the assignee goes through the situation of securing a new position in the home location providing high levels of insecurity (Gregersen & Black, 1996: 210) similar to the situation faced by temporary workers. The findings of Torka's research highlights that the organisations she investigated attempted to match HRM policies and practices with the expectations of atypical workers. As Torka (2004:341) states 'In general, only if HRM meets the expectations of employees can employers expect their workers to show commitment.' She goes on to add that 'all workers want managers and supervisors to listen to their views. HRM must provide space for each individual and use a range of appropriate approaches since preferences do differ among workers'. Thus employee voice is essential for successful HRM; equally HRM should have a voice too.

The mechanism used to listen to employee's views, noted by Bryson (2004:240) as direct voice is a 'two-way communication between workers and management without the mediation of a representative'. HRM theorists and practitioners suggest that direct voice can be an effective means of communication via regular meetings with senior management and problem solving groups. Such communication is associated with greater managerial responsiveness. The dilemma is the nature of the communication with the repatriate, within Black et al's (1992) model is it noted that greater communication forms part of the task interdependence that advocates maintaining contact with home location which is key to setting expectations. However, this assumes that the contact within the home location ie the line manager has been identified with sufficient time to build a rapport with the repatriate.

Further research by Bryson, Charlwood and Forth (2006:453) highlights that the link between worker voice and productivity depends upon management's responsiveness. Their research found a strong positive relationship between worker perceptions of managerial responsiveness and productivity. Thus, suggesting that improving managerial responsiveness to employees would also improve productivity. The Hailey et al (2005:63) study highlights the need to add employee voice into the arena in order to develop the model for HRM and performance. Thus HR should also form part of the

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communication to enhance voice. Again clarification of who would be responsible requires further research.

Specifically, in the case of international assignments it is crucial to consider which HR practice is delivered by whom; the home/host HR, IHR or the line manager. Benson's study of contractor employees found evidence of dual commitment to the agency employer and host organisation. Although it is noted that commitment towards the host organisation was far higher than the agency. Benson (1998:369) suggests that if commitment to the host organisation is a key factor then, given the nature of dual commitment, it may lead to an increased commitment to the employment agency. Therefore, in this study we might expect to see repatriates who form a close bond with the host organisation which will increase their commitment towards the home location.

Coyle-Shapiro and Morrow's (2006a) research into client commitment among contracted employees also explores long term contract workers affective commitment to the temporary agency and the client organisation. Further research findings highlight that favourable commitment attitudes towards contractor and client organisations are simultaneously possible and can, respectively, be influenced by enhanced perceptions of organisational support that instil a felt obligation (Coyle-Shapiro et al, 2006b:563). Furthermore they suggest that HR practices that are well received by employees should also be well received by contracted employees. Without such support organisational commitment could be destroyed. Perhaps more pertinently in the case of expatriates is that 'out of sight out of mind' scenario could destroy organisational commitment. Therefore Coyle-Shapiro et al (2006b) findings suggest that maintaining favourable perceived organisational support (POS) perceptions from employees who work on client sites or within a host location requires concerted effort. Thus, continued links via communication from the home location should be positively received by the impending repatriate strengthening their commitment towards the organisation.

Extending the work of Coyle-Shapiro and Morrow (2006), Connelly et al (2007) focus their attention upon temporary workers rather than long term contractors. The results of Connelly et al's study found strong support for the relationships reported by Coyle-

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Shaprio and Morrow's work. The study finds that POS from a client organisation is related to the affective organisational commitment towards the client. Furthermore, the study suggests that client POS is also related to continuance commitment towards the clients as well as affective and continuance commitment towards the temporary agency. Thus positing that temporary workers' affective commitment towards their temporary agencies are related to their feelings of support from these organisations.

However, it is noted that continuance commitment to the temporary agency is related to an individual's preference towards permanent employment in this study. Working for more than one organisation at the same time creates a different perspective to study than a regular employment relationship (Liden, Wayne, Kraimer, & Sparrow, 2003), thus replicating the situation within an international assignment. Kramier and Wayne's (2004) research investigates a multidimensional measure of POS within an integrative stress model of expatriate success. They define commitment to the organisation as the expatriate's affective attachment to the organisation. Furthermore their research assumes that during repatriation the assignee will be less likely to leave the organisation due to their commitment, this is in contrast to the previous views noted that suggest it is the most likely time the assignee will leave the organisation (Baruch et al, 2002; Black & Gregersen, 2007; Gribben 2006).

2.7 Social Cognitive Career Theory (SCCT)

So far the theoretical discussion has focused upon HR policy and practice and how this may influence the management of an effective repatriation processes. In addition the literature from URT has been discussed in line with repatriation as well as introducing psychological contract and commitment theory. Yet, there are further areas of literature that can contribute towards our understanding of repatriation. One theory that helps to explain receptivity to international work is Social Cognitive Career Theory. Equally harnessing what makes people receptive to a particular career develops our understanding of what would assist individuals' receptiveness towards their return position.

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Tharenou (2003) postulates that taking constructs from Social Cognitive Career Theory (SCCT) helps to explain why people are drawn to different careers, make varied choices and pursue different educational and occupational goals, thus drawing attention to person factors contributing to the success of international assignments. Therefore, exploring the receptiveness of a potential assignee during the phases of an assignment such as repatriation could be explored.

The SCCT model is based on the work introduced by Bandura (1977:194) that attempts to determine human behaviour as an interaction between person factors. The influences of behaviour, individual, cognitive and environmental factors determine how people interact and learn from each other. Bandura explores the idea that the greater a person's perceived self-efficacy the more likely he or she is to exert greater effort to overcome perceived potential obstacles. SCCT furthers the idea that career interests develop on the basis of person factors, such as self-efficacy. Tharenou believes that young graduate employee's receptivity to international work is comparable to career interest in this respect.

Drawing on SCCT, Tharenou (2002:131) discusses the merits of considering personal factors that explain an individual's receptiveness to an international career. Personal factors include international ability, attitude to relocating overseas and personal agency in terms of self-efficacy (the belief that you can influence your own thoughts and behaviour) and expectations of the likely outcome of an assignment.

SCCT approach focuses on the development of the career and how it is shaped. In addition to the personal constructs, the perceived environment is also considered important. What opportunities are likely for the individual? What support can they expect? What are the barriers (such as family issues) that may impact upon the receptiveness of an international assignment?

The research undertaken by Tharenou (2003) explores the receptivity of young graduates entering their first employment. Her longitudinal study was designed to

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examine how receptivity to international work develops over a period of time. Tharenou's (2003:509) study is the first research to explain how receptivity to international careers develops and by exploring additional variables such as the organisation's international focus. Areas examined included self-efficacy for international work. She found that the greater the personal self-efficacy the more willing an individual was to undertake the assignment in developing countries (Tharenou, 2003:511). Additional research (Baruch et al, 2002; Suutari & Brewster, 2003) supports the view that where an individual perceives enhanced career development in undertaking an international assignment they will be more positive towards an expatriation. The prospect of enhanced career development is also noted within the domestic literature (Kuvvas, 2008).

The assignee's individual circumstances with regard to a partner and family were found to influence the receptivity to an assignment. Indeed, Tharenou highlights that family influence is the greatest barrier to young people working abroad. Although one might expect that family considerations are of paramount concern - including education for children, partner support for career, accommodation etc. - the actual support offered to assignees is under researched. Indeed Shaffer et al (2001:117) state 'Perceptions of organisational support and both work interference with family (WIF) and family interference with work (FIW) conflict and assignment withdrawal cognitions can be amplified by the expatriate's levels of commitment to either his or her organisation or family'. Larson's (2006) study contributes to the call for further research regarding the trailing partner. He suggests that organisations need to take care of the trailing partner and family if they want further assignments to be undertaken.

Tharenou's study provides useful insights into previously under-researched areas such as self-efficacy in the context of international assignments. Furthermore Tharenou suggests that the size of the organisation in terms of their international standing does not appear to effect willingness of the assignee to accept an assignment. However, HR activities such as international policies, cross-cultural training and accommodation increase receptivity to an assignment. Thus reinforcing the importance of HR activities. In addition, consideration is given to the difference in receptiveness to go to developed

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versus developing countries. Tharenou suggests that relocation to developing countries requires more HR assistance. However this should be clarified as the implication is that assignees moving to a developed country require little HR support. This is debatable in light of previous research. For example, Shenkar (2001) argues that some of the highest rates of expatriate failure are among those who believe that the same spoken language is sufficient to enable a successful assignment (for example going from the UK to the USA).

Tharenou (2002) contends that by providing employees with a supportive environment, employees are more likely to undertake an assignment in the first place. Therefore it is crucial to set expectations from the beginning of the expatriation process. The perceived environment is a combination of: opportunities such as the organisations focus; support from sources such as Human Resources (HR); and barriers such as family and disruption to routines. In addition, the expatriate's technical competence, attitudes to relocating as well as their perception of the likely outcomes should be considered. Ultimately, the interaction between person factors and perceived environment affects their receptiveness to working abroad.

Exploring SCCT as a concept to progress research into repatriation provides some interesting questions that need further development. Tharenou highlighted that a combination of factors influence the development of receptivity to working abroad. Equally, in the repatriation phase of an assignment similar factors will influence the receptivity towards repatriation, none more so than home barriers and work environment opportunities. Some interesting results from Tharenou's research indicates that HR support might be dependent upon need, suggesting that a broad brush approach to HR activities may not be appropriate. Tailoring HR activities to the individual needs of the expatriate requires further consideration during each phase of the assignment as this may increase the receptivity towards an assignment. But how does this further the research agenda for repatriation? The conclusions drawn regarding family concerns are worthy of future study, as this was found to be the greatest barrier to receptivity towards an assignment from an employee's perspective. During the repatriation phase family concerns could still remain an issue. For example, continuity of education as well as

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partner concerns will form part of the concerns of returning home. Thus leading the author to consider how delivering supportive HR activities is reinforced by the expatriate policy and practice. Furthermore the HR policy and practice will be valued according to the need of the repatriate.

Thus SCCT develops our understanding of why employees take up international experiences based on their career. Uncertainty reduction theory (URT) explains expatriate adjustment, not career interests (Black et al, 1991). Interestingly employees may take up international careers in order to change their regular work and embrace changes to their work environment. Tharenou argues that theories designed to explain career choice provide more complete explanations than URT because they specifically explain career interests and development (Tharenou, 2001:130). However, a combination of theories arguably offers a more complete foundation to base future studies into repatriation.

2.8 The need for further research into HR practices for repatriation

A review by the Academy of Management (see Volume 50, 5, October 2007) highlights the Research-Practice Gap in Human Resource Management and academic research. Cohen (2007) refers to the deficit of Evidence Based Management (EBM) whereby she states “There should be a required section on practitioner application in all scholarly articles in journals” (2007: 1018). Guest (2007) concurs that academics need to consider EBM more carefully from a user perspective. From previous research conducted by Guest and King (2004) in the UK, they argue that a major concern of managers was the evidence of application within an organisation. Therefore, if another manager from a similar organisation and position offered evidence of practices working within their organisation this was more likely to influence adoption of the practice rather than reading about the evidence within a practitioner periodical. This view has been supported by Rynes, Colbert and Brown (2002) and more recently through the research of Sanders, Van Riemsdijk and Groen (2008) whereby their research concluded that HR practitioners read HR professional journals to inform their work rather than academic journals. Therefore exploring specific HR practices surrounding the process of

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repatriation can add value to academics and practitioners alike if reported in both academic and practitioner journals. The central tenet of previous academic research refers to expatriate cultural adjustment training rather than the practical implications of additional supporting HR practices (Black et al 1991; Tharenou, 2003; Holopaniemi & Bjorkman, 2005). The question is how the HR department can add value and provide a co-ordinated approach to the activities that will assist the assignee and their family to successful repatriation.

Lepak, Bartol and Erhardt (2005) provide a useful framework for the delivery of HR practices dividing delivery between internal delivery, contract or partnership. Their research suggests that focusing on the types of HR practices, rather than the practice itself requires HR professionals to expand their focus to a more organisational perspective. Regarding transformational practices, as innovation and change become the norm rather than the exception, the ability to adapt becomes increasingly important. Given innovative firms' strategic needs, the transformational HR practices focusing on wide-scale organizational change and development efforts, rather than transactional HR practices, are those most likely to be valuable to HR departments. Thus there is an incentive for the HR function to perform these practices in-house. Internal staff are likely to be in a better position to understand the nature of the firm and the requirements that these types of HR practices place on their firm. More to the point, as HR professionals often have extensive knowledge of the firm's needs this ideally places HR to be in a position to assess and respond to changes in the workplace, and ultimately deliver practices that are valued by the organisation (Lepak et al 2005:148).

International assignees pose unique opportunities that challenge the business to find a return position to benefit the company and the individual. HR is able to bring together the knowledge about the repatriates skills and competencies to add greater value upon their return and assist with retaining a valuable resource. This suggests that HR has a role in providing transformational HR that benefits all stakeholders.

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2.9 Summary

The literature supports the notion that during the repatriation process is the most likely time that an expatriate will leave the organisation (Bossard and Peterson, 2005; O'Sullivan 2002; Paik, Segaud and Malinowski, 2002; Baruch et al, 2002; Stevens et al, 2006). Differences between the management of the repatriation process appear to vary according to the country of origin of the company and the individual. Bossard and Peterson (2005:10) believe that European MNCs are often more efficient in retaining expatriates than their American counterparts.

In order to understand why repatriates leave the organisation, previous literature surrounding international assignments has emphasised the role of cultural adjustment (Dowling, et al, 2008; Dowling & Welch, 2004; Kraimer & Wayne, 2004; Shaffer et al, 2001) stemming from the first systematic approach to expatriation (see Black, 1991). The addition of a theoretical framework specifically to address the area of repatriation adjustment has undoubtedly brought the issue of repatriation to the research domain providing a foundation to build further theory (Black, Gregersen & Mendenhall, 1992).

In this review, I have explored SCCT; commitment theory; POS; developing HR practices and policies; to broaden the research agenda. Providing a choice of HR practices that support repatriation has been introduced by reviewing the domestic literature on best fit approaches (Kinnie et al, 2005). The role of the line manager/supervisor is arguably more complex in an assignment situation than in a domestic context as the repatriate may have home and host line managers supporting their return in addition to the HR function. Thus reviewing the literature regarding atypical work arrangements has introduced dual commitment towards the host and home organisation in order to further understanding of the repatriate's situation between home and host organisation. The supervisor's role will be crucial during the repatriation process to determine the likelihood of whether the repatriate will remain with the organisation or become another exit interviewee. Future research of the actual experiences of the repatriation process in terms of HR practices and policies experienced by repatriate and their family will provide a greater insight into what affects the commitment to the organisation upon repatriation. In order to address this gap in

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knowledge we need to develop our understanding of the various stakeholders involved with the repatriate and the process. Thus the original research question: to develop greater understanding of the repatriation process and the actors involved within the process requires further research. The literature review has lead to additional research questions that involve the roles of the various stakeholders within the process. The following questions allow for further evaluation of the repatriation process, incorporating:

What is the individual's experience of repatriation?

What is the HR professional's experience of repatriation?

What is the International HR's experience of repatriation?

What is the line manager's experience of repatriation?

In order to gain greater insight into the repatriation process the following objectives will be pursued:

To establish the current repatriation process within a selected organisation;

To identify organisational stakeholders and their perception of the repatriation process;

To critically evaluate repatriation policy and practices;

To determine the implications for the stakeholders.

The next chapter will utilise the literature to highlight the method design in order to develop a deeper understanding of the research questions posed.

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3. Research Methodology

Edmondson and McManus (2007:1155) note that in order to advance management theory increasing numbers of researchers are ‘engaging in field research, studying real people, real problems and real organisations’. Most pertinently they reflect that the research journey can be messy and inefficient with obstacles such as sample selection, timing of data collection, and changes during the project along the way set to detract from the journey and of course the original research design. These additional challenges involved with field research call for evolving methodological fit. They suggest methodological fit as internal consistency of elements of field research that encompasses four elements with corresponding descriptions including: research questions and focus of study; prior work and state of the literature; research design and type of data to be collected; contribution to the literature and the theory developed as an outcome of the study (Edmondson & McManus, 2007:1156). The aim of such a framework provides guidelines for field research, but more importantly addresses the need to create an iterative learning process that requires openness to rethinking and revision of research designs. Thus this chapter seeks to review the journey incorporating the research epistemology, the research design and subsequently methodology adopted for this thesis.

3.1. Research Questions

The overall aim of the research is to develop an understanding of the repatriation process including how it is perceived by the various stakeholders that are involved with the process within an organisation. This is a departure from previous research that has focused on the experience of the repatriate with some research involving the HR functions view (Black et al, 1991; Bossard & Peterson, 2005; Brewster & Suutari, 2003; Sanchez Vidal et al, 2007).

The research questions were to evaluate the repatriation process within an organisation, which incorporated the following:

What is the individual’s repatriation experience?

What is the HR professional’s repatriation experience?

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What is the International HR's repatriation experience?

What is the line manager's repatriation experience?

Rather than testing a hypothesis, the research questions were open ended (Willig, 2009:20). Good qualitative research questions tend to be process orientated investigating how something happens rather than what happens (Seale, 2007:387; Willig, 2008). The research began with provisional questions as the researcher wanted to allow for reflection regarding the concepts and terminology used in the research questions which may require amendment in order to interpret the participants' experience. This was formalised through the use of pilot interviews which are discussed in greater detail in a following section.

Table 3.1 Methodological implications of different epistemologies within social sciences. (Easterby-Smith, Thorpe & Jackson, 2008: 63)

	Positivism	Relativism	Social Constructionism
<i>Elements of Methods</i>			
<i>Aims</i>	Discovery	Exposure	Invention
<i>Starting points</i>	Hypotheses	Propositions	Meanings
<i>Designs</i>	Experiment	Triangulation	Reflexivity
<i>Techniques</i>	Measurement	Survey	Conversation
<i>Analysis/interpretation</i>	Verification/falsification	Probability	Sense-making
<i>Outcomes</i>	Causality	Correlation	Understanding

Although differing philosophies are noted, it is not easy to identify research methods that map each approach in practice. The area to be investigated focused upon the management of the repatriation process, whilst a positivist approach may have been appropriate it was deemed unsuitable due to the inductive nature of this research, the focus of the research sought to explore individuals' accounts of the repatriation process.

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Social constructionism (SC) according to Willig (2008:7) takes into account a person's perception as well as their actual experiences of their environment, suggesting that 'there are knowledges rather than knowledge' which is a way of constructing reality rather than simply reflecting it. Eatough and Smith (2007) endorse that SC reflects the central tenet that our experience and understanding of lives including the stories we tell about these lives is supported by approaches such as Interpretative Phenomenological Analysis (IPA).

The research question, philosophical approach, data collection technique and method of analysis are dependent upon one another. Schilling (2006: 28) aptly notes that qualitative research is an umbrella term used for many different research approaches including: grounded theory, phenomenology and discourse analysis. The researcher identified that SC may allow for greater in depth inquiry pertinent to the research questions highlighted earlier, as the central tenet of social constructionism is how people construct and place meaning upon their experience (Easterby-Smith et al, 2008: 59). The methodology, in order to follow this line of inquiry, required further investigation as it became apposite to pursue a qualitative research method, which is discussed later.

Qualitative methodologies can be differentiated according to reflexivity and epistemological reflexivity which is based upon our values experiences, interests and beliefs (Gribich, 2007; Willig, 2008). Reinforcing Edmondson & McManus's, (2007) view of a continual iterative process, Willig describes epistemological reflexivity as a means of encouraging rethinking of the chosen approach to methodology. Reflection upon the initial research questions and whether the questions could limit what can be found as well alternative approaches to analysis provide a platform to continually question the final research approach. Thus it could be argued that the research journey has been informed by reflexivity both personal and epistemological.

Qualitative researchers, generally, are interested in creating meaning and understanding what it is like to experience conditions rather than just trying to identify cause-effect relationships (Dickmann & Doherty, 2007; Easterby –Smith et al 2008: Gribch, 2007). Willig (2008:8) suggests that using preconceived 'variables' leads to imposing the

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researcher's meanings and precluding respondents' sense making of the phenomenon under investigation.

Qualitative data methods are designed to minimise data reduction, as the objective is to create a comprehensive record of the participant's view (Smith and Osborn, 2008). Therefore reducing loss of meaning during translation is crucial. The analysis phase results inevitably in reducing the data raising the issue of validity (Dickman & Doherty, 2007:4). Willig (2008: 16) argues that whilst quantitative research relies upon pre-coded data collection techniques such as multiple choice and closed questions, qualitative data collection allows the researcher to challenge assumptions about the meaning. Participants are able to challenge and correct the researcher's assumptions about the meaning being investigated. If the study and its findings make sense to the participants it must have validity.

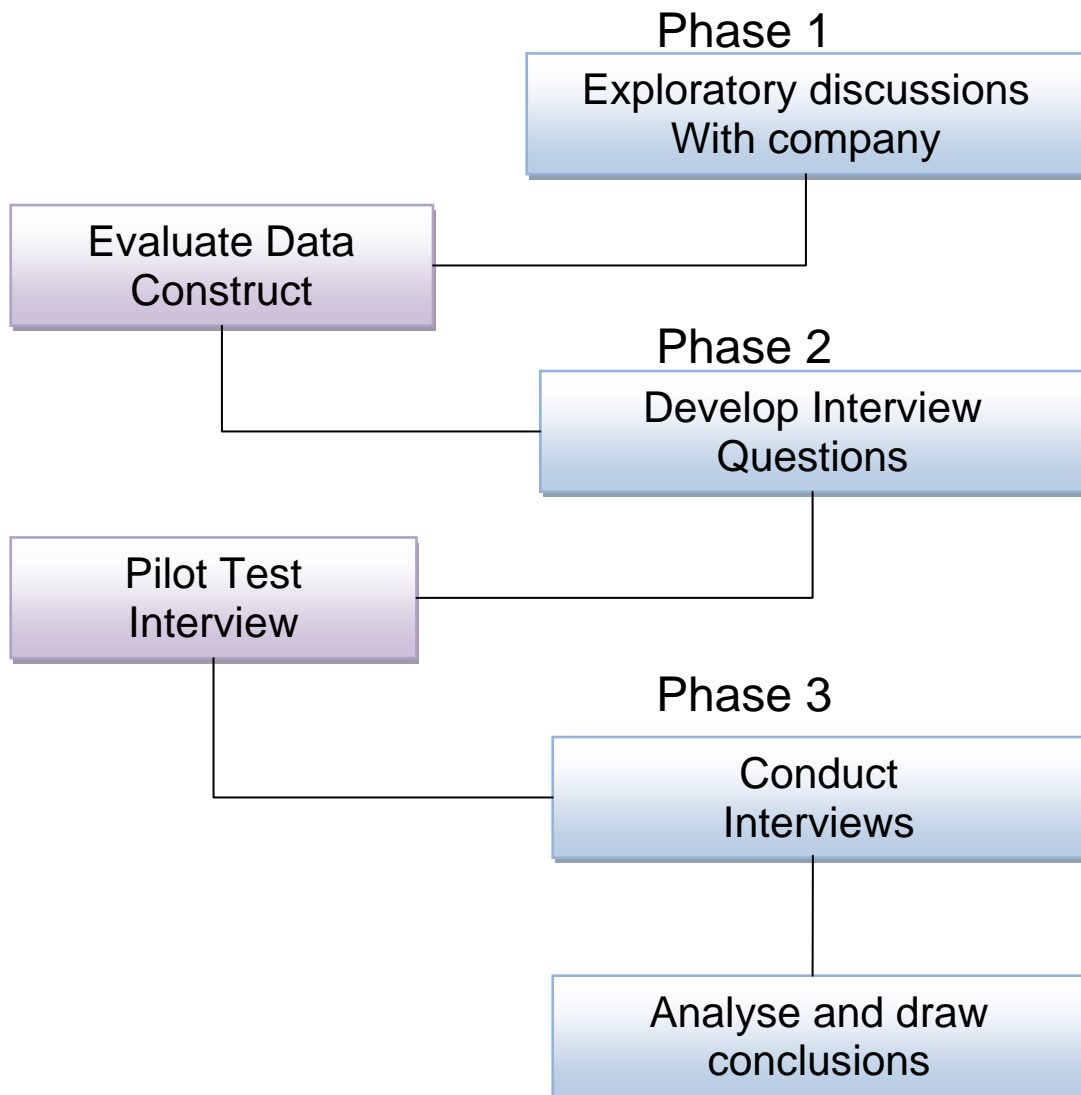
As much of the qualitative data collection takes place in real-life settings e.g. workplace this precludes the necessity to extrapolate from an artificial setting, such as a laboratory. Thus it is argued (Miles & Huberman, 1994; Willig, 2008; Yin, 2003) that this provides a higher ecological validity and that reflexivity ensures that the researcher continuously reviews their role within the research.

This leads to the following section that outlines the overall research design.

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Figure 3.2 Research Design

The primary overall research design is summarised in the following diagram.



The final research design offers an overview of the steps undertaken by the researcher. During this process, whilst illustratively sequential steps are highlighted the continual reflection on the part of the researcher between each phase should be noted.

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3.3 Organisational context

In order to investigate the repatriation process in context the support of a global financial institution was sought. However, the name of the organisation will not be referred to in order to maintain anonymity. During the last decade the organisation has grown into one of the world's largest financial institutions, with one of the largest retail banking networks in the UK. Despite the economic climate the company suggests that they have grown profits over the last ten years.

The organisation closely follows the work of Ulrich (1997, 2005, 2009) and as such advocates that HR must be aligned to the business and that HR work is increasingly split into transactional and transformational. The HR function is broken into various functions with differing responsibilities. The International Human Resources (IHR) function, responsible for the management of international assignments, used to be part of HR shared services which is a transactional operational part of HR. In contrast the policy sat within remuneration and benefits (R and B). However, the organisation has moved the two parts together therefore processing of an assignment and the case management, along with the policy fall under the R and B function.

The expatriate population of the organisation averages over 100 people on international assignment terms throughout the year; this is typical of the industry sector (PwC, 2005). The administration of international assignments has seen some major changes during the past decade with an outsourced approach reversed in 2005/6 to an in-house model served by an International HR function based centrally in the UK. The UK team are lead by a Senior International HR manager with the assistance of two further managers based in the US and Hong Kong respectively. A further team of case managers and administrators are based in the UK with little administrative support for the host line managers based overseas; arguably this role falls to local HR.

3.4 Ethical considerations

Ethical consideration was addressed to ensure organisational support for the research as well as consideration of the individual participants (see section 9 for a more in depth

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information). The researcher gained ethical approval from the University ethics committee before conducting any research in line with the guidelines outlined in appendix 9.1.

This study involved multiple stakeholders with different perspectives. It was important to consider the ethical issues for each stakeholder group (Anderson, 2009). Thus consideration was given to the individual including the repatriate, HRBP, IHR, and line manager. In addition the researcher considered how the study might affect the reputation of the organisation as well as the University. In addition the researcher reviewed the CIPD code of ethics in order to comply with the author's professional body (www.cipd.co.uk/about/profco.htm).

The researcher has taken care to consider ethical responsibilities from the initial planning stage (Patton, 2002:405; Saunders et al, 2003:131). The researcher has developed the research design and selected the research methods in consideration of the ethical obligations outlined by The University of Portsmouth Ethics Committee Guidelines

(<http://www.port.ac.uk/departments/faculties/portsmouthbusinessschool/research/pbsethics/>).

The researcher prepared a letter of invitation, consent form and participant information sheet in accordance with ethical guidelines (NRES guidance on information sheets and consent forms, 2006 and the University of Portsmouth guidelines). In order to fulfil the ethical requirements of this research, the participants were by no means coerced to participate (Robson, 2002:69). Additionally, after each interview participants were able to review the interview transcribe and ensure they were satisfied with the content. The option to withdraw from the research was possible until the analysis was undertaken. Furthermore, all participants' names and the names of their organisations have been changed to maintain anonymity.

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3.5 Previous research

The work of Black & Gregersen (1992) has certainly provided a platform to develop a deeper understanding of managing the expatriate process. The models offered have had limited testing with some arguments presented by Taveggia & Santos Nieves (2001) that were not conclusive.

In this instance, the researcher wanted to adopt a cross-sectional study that takes a snapshot of the situation at various stages of the repatriation process. Whilst generating the data could be collected via administering a questionnaire the preferred approach adopted by Suuatri and Brewster (2003), the researcher sought to provide the opportunity to develop ideas exploring how other stakeholders such as line managers as well as the HR function contributed to the repatriation process therefore I preferred a qualitative approach generated by semi-structured interviews.

Suuatri and Brewster (2003) undertook longitudinal surveys over three years; following the same cohort of expatriates their study found in general that an international assignment enhanced career prospects. Adopting a longitudinal approach (Anderson, 2004; Saunders et al, 2007) provides advantages that the researcher is able to monitor the progress of a situation. Indeed several researchers have commented that this is an ideal approach to understand the situation with expatriates (Black & Gregersen, 1991; Forster, 1997; MacDonald & Arthur, 2003; Suutari & Brewster, 2003; Tharenou, 2002). However, the time constraints and economic situation prohibited this approach which may have been particularly apposite for the research questions posed.

In addition, secondary sources of data were analysed such as the organisation's repatriation policy. Other studies such as Forster (1997) and more recently Dickmann and Doherty (2005) discuss within their research that organisational documents formed part of their data gathering activities allowing interpretation of the organisations view of the process to be reviewed alongside the actual experiences of the various stakeholders.

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3.6 Interviews

Previous limited research (Black, 1992; MacDonald & Arthur 2005; Stahl et al, 1992; Zikic, Novicevic, Harvey & Breland, 2006) has concentrated on exploring the management of the adjustment and career prospects. Some consideration of the individuals' perspective is noted with the work of Suutari and Brewster but arguably more is needed. By utilising semi-structured interviews a deeper picture develops in order to provide some practical considerations to improve the management of the repatriation process. The sole purpose of interviews is to provide an opportunity for the participants to share their personal experience of the repatriation process (Willig, 2009:57). Alternative approaches to interviews; such as diaries, video or written accounts were discounted mainly due to the practicalities involved such as timing. Participants were happy to spend an hour of their time in an interview, but completing a diary was noted by one as onerous. Having gained the repatriates' view further interviews were conducted to compare and contrast the views of the process held by the International HR, HR and Line managers involved during the repatriation phase of an assignment.

It is more likely that using semi-structured interviews leans towards a phenomenology underpinning, interested in the way events appear to individuals at particular times (Willig 2008:53). Furthermore semi-structured interviews generate the opportunity to reveal and understand the 'what' and the 'how' but also to place more emphasis on exploring the 'why' (Anderson, 2009; Easterby-Smith et al, 2008; Flick, 2009; Rapley, 2007). Schostak (2006) refers to interviews as something that individuals feel comfortable with, we are constantly exposed to interviews, for example when procuring a new position or simply watching interviews on the televisions, there is a sense that in interview will glean the truth. Incorporating elements of both open and closed questions, helped to balance the interview introducing some of the benefits of structured interviews. The advantage of a semi-structured interview is that it allows the data to be themed and analysed. The transcript of the interview could be subject to content analysis therefore falling within a positivist paradigm whereas from an interpretivist stance the data would be used to establish issues understanding the role of HR within the repatriation process for example.

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Whilst interviews are viewed as a great source of gathering information there are several issues to overcome (Brewerton & Millward, 2001:74; Flick, 2009). If the research is entirely dependent on interviews then timing is one issue to consider. How long will the interview last, is it reasonable for your respondents to provide more than 30 minutes to one hour of their time, how many people will be interviewed was also considered, which is discussed in more depth during the sample section. Whilst face-to-face interviews may provide more opportunity to illicit trust between the interviewer and respondent due to geographical locations this may not be practical. In the case of this research some of the sample was repatriated to another country and therefore a telephone interview was more practical. However, the final sample resulted in a mix of face-to-face and telephone interviews.

The disadvantage of semi-structured interviews as a research method is that it cannot necessarily be repeatable because each interview is unique to each interviewee relying on the information provided at that time. Every answer will be slightly different; allowing themes to be covered prompted the interviewer to ask a question in a different way. Another criticism of the approach is that the interviewer can incite bias from the interviewee. Avoiding leading questions can be difficult to manage. Not only does the interview require attention with the questions asked but also intonation can play a part in leading the interviewee. Piloting the questions helped to provide consistency to ensure that the questions were appropriate as well as enhancing future timings of the interviews. A final consideration was that the interviewee may withhold information adding their own dimension of bias, this the researcher believes is unavoidable.

To overcome some of the disadvantages highlighted, the interviewer adopted a set of guidelines for participants including ethical considerations for the interview process. A framework of questions was adopted to assist in limiting potential issues by designing the interview for consistency (Brewerton & Millward, 2001: Flick, 2009; Rapley, 2007). Avoiding interview bias, especially when asking a probing question, can be limited by precluding a probing question to lead, which were identified during the pilot process discussed in the next section. For example, requesting why did you have a poor

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experience during your repatriation? This could lead to a negative answer. Therefore the question was rephrased to ask: How was your repatriation experience?

3.6.1 Strategy for Questions

During the literature search several repeating themes concerned with repatriation presented themselves such as the actual process of the repatriation, career path, family support etc. Willig (2008:25) discusses the interview agenda and introduces Spradley's (1979) interview guide which produced the following thoughts about the interviews and generic questions.

Descriptive questions: general account of what happened through the repatriation process and who was involved e.g. HR, line etc. (Lazarova & Cerdin, 2007)

Structural: what does it mean how did you decide to repatriate or extend? (Baruch et al, 2002; Black & Gregersen, 1991; MacDonald & Arthur, 2005)

Contrast: would you rather be on assignment or stay at home? (Richardson & Zikic, 2007; Tharenou, 2002)

Evaluative: interviewees' feelings towards the process and the organisation. How did you feel about this? (Bossard & Peterson, 2005)

This led to some basic questions that formed part of the Pilot process.

3.6.2 Pilot Process

The interviewer tried to make themselves aware of the possible interests of the interviewee. Avoiding the repatriates becoming involved with discussions away from the central themes was hard to avoid. However the use of pilot interviews, in part, addressed this possibility by refining the questions and themes. Pilot themes and questions are noted below, the accompanying revised and final questions were asked of the final sample.

Have you forged strong ties with colleagues whilst on assignment? (Richardson & Zikic, 2007).

What impact has your assignment had on your career prospects? (Stahl & Cerdin, 2004)

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What did you learn from the international experience?

Talent Management, do you believe you are part of a talent pool? How is this maintained whilst on assignment? (Dickmann & Doherty, 2007).

What does commitment mean to you?

What does commitment towards your daily work mean to you?

What does commitment towards your colleagues mean to you?

What does commitment towards your department mean to you?

Did you feel committed towards your host department?

Questions were posed to relate to organisational commitment noted by Gregersen and Black (1996).

The pilot interviews were undertaken by two returning repatriates 11 months after their return. Several issues became clear from the questions posed. In the first case career capital quickly took over the entire interview precluding a focus on the actual repatriation process including who and how the repatriation process had been delivered. The other main reflection was that the interview became far too long totalling 125 minutes and again lacked focus upon the repatriation process. Finally, the line of questioning regarding commitment did not seem to provide in-depth answers and on reflection appeared repetitive. After the first analysis of the pilot questions the author decided to alter the number of questions and focus on the following questions:

3.6.3. Final Questions

The final questions were formed after a systematic review of the literature, thus the following questions were the resulting of a mapping exercise:

What is your age? According to Black et al's (1996) study of repatriates older expatriates are said to find adjustment easier on their return than younger colleagues.

What is your gender? It was anticipated that the sample would reflect the general trend that female expatriates and therefore female repatriates would be low in line with

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previous research that highlights on average on 10% of the expatriate population are female (PwC, 2005).

Were you accompanied on assignment and by whom? Repatriation programmes involving the accompanying family have in previous research remained low (Riusala & Suutari, 2000). This question was posed to see if within the sample this figure may have improved.

What is your highest level of education? Lazarova and Cerdin (2007) suggest it is useful to understand general characteristics of participants.

How long have you worked for the organisation and in your current position? This question was posed to see whether longer serving employees would raise their commitment towards the organisation in terms of pension etc. providing examples of continuance commitment to the organisation (Meyer & Allen, 1991).

How long were you on assignment? In order to participate the interviewees had to be on an assignment of over 12 months (Lazarova & Cerdin, 2007). The author was interested in long term assignments generally acknowledged to be between 12 months to 4 years (PwC, 2005).

How long have you been repatriated? According to Lazarova and Cerdin (2007:410) up to two years is considered an appropriate time frame to conduct repatriation research. Further field research concurs and notes up to one year upon repatriation provides sufficient time for repatriates to complete the entry process as well as to develop a balanced perspective with regard to their experience (Adler, 1981; Black & Gregersen, 1991, 1999; Stevens, Oddou, Furuya, Bird & Mendenhall, 2006). Therefore the author decided to preclude any repatriates over 2 years.

Have you been on any previous assignment? Richardson & Zikic, (2007) suggest that serial expatriates seem unable to build strong relationships with individuals whilst on

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assignment. In addition previous repatriation experience may influence the expectation of a further repatriation (Lazarova and Cerdin, 2007).

When was the repatriation discussed (was it timely?) and by whom – home/host line mgr, HR home/host, IHR? In order to reduce uncertainty for the return to the home organisation, it could be argued that a longer lead time in communicating the repatriation is viewed positively by the repatriate (Black & Gregersen, 1991; MacDonald & Arthur, 2005).

What support activities were provided to you, your partner/children and by whom – home/host line manager IHR, HR home/host? Lazarova and Cerdin (2007) discuss the merits of exploring the relationship between HR practices such as repatriation and career development. From the results of their research they believe that the more support programs offered to the repatriate the more likely the employee will be to engage in strategic planning related to their careers within the organisation rather than seek external opportunities. Further research supports this view such as Lazarova & Cerdin (2007) and Liu, Yuwen (2009). Furthermore, Larson's (2006) research examined the effect of partner and family adjustment; both in country and upon repatriation concluded that willingness to relocate, either for a first assignment or subsequent assignments were significantly affected by the family's experience of repatriation.

Who were the main contacts for support in each scenario e.g. line Mgr HR home/host IHR? The author posed this question to gain an understanding of who were the main contacts and how the interactions are perceived by the repatriate (Kramier & Wayne, 2004; Perry & Kulik, 2008; Purcell & Hutchinson, 2007).

Did the repatriation policy influence your decision to undertake an assignment? (Guest, 1999; Kidd & Smewing, 2001; Linehan & Scullion, 2002; O'Sullivan, Applebaum, Abikhzer, 2001).

What does commitment towards the expatriation mean to you?

What does commitment towards the repatriation mean to you?

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(Meyer & Allen, 1991; Stroh, Gregersen & Black, 2000; Kinnie, Hutchinson, Purcell, Rayton, Swart, 2005).

How many times did you return to your (home) work location during the assignment? During these visits did you discuss your repatriation with anyone and who? Allen and Alvarez (1998) propose that maintaining visibility at home location aids repatriation process.

How was another role identified upon repatriation and who was involved home/host line mgr, HR? Peterson, Napier and Shul Shim (2000) found that only 2 out of 10 of their sample organisation offered a guaranteed position upon return, this concurs with earlier research conducted by Tung (1988). Tung's research found that the majority of repatriates in the sample had no guarantees of position upon return, leaving them dissatisfied with the repatriation process.

What, if any, improvements would you recommend to improve the repatriation process? Rather than lead a question regarding the importance of debriefing the author felt that this question would allow the repatriates to explain the key elements of the repatriation process pertinent to them such as including debriefing.

Have you anything to add that we did not discuss, but is important to you for expatriation and repatriation? This question allowed the researcher to incorporate any other area the interviewee felt important.

The IHR, HRBP and Line managers were asked to describe the process and where and when they were involved. The following questions were posed, which mirror the questions asked of the repatriates.

How long have you worked for the organisation and in your current position?

When does the repatriation process start and how is it initiated, by whom?

What actions do you have to undertake within the repatriation process?

How does IHR fit within the organisation?

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What is a successful assignment?

Do you believe there are clear handoffs between all the stakeholders within the process?

What improvements to the repatriation process could be made?

How is retention monitored?

Is there a difference between when the costs are shared between home and host to the repatriation process?

Did the repatriation policy influence your decision to support the assignment?

Have you anything to add that we did not discuss, but is important to you for expatriation and repatriation?

3.7 Approach to analysis

Easterby-Smith et al, (2008: 172) suggest that there are six approaches to analysing the data including: grounded analysis, content analysis: narrative analysis, discourse analysis, conversation analysis and argument analysis. Additional forms of analysis such Interpretative Phenomenological Analysis (IPA) have gained popularity amongst psychologists during the last decade (Willig, 2001; Eatough & Smith 2007; Smith, 2008). A brief overview of some of the approaches follows including: grounded; narrative; content and IPA which were approaches considered for this research.

3.7.1 Grounded analysis

Grounded analysis is closely linked to the concept of grounded theory which was seen as an possible research methodology. Utilising an inductive approach the aim of grounded analysis theory is to generate an analytic substantive schema through a process of theoretical sensitivity which after comparison with other substantive areas can become final theory. Grbich (2007) notes that this approach is more suited to small scale environment where little previous research has been undertaken. However, Easterby-Smith et al's, (2008) description does not reflect the various debates that surround grounded theory's approach. Grbich (2007:70) believes that grounded theory suffers from fragmenting the data too much which can lead to dilution of the overall context. Furthermore, Dey (2007:80) argues that there is no such thing as grounded theory if we mean by that a single, unified methodology, tightly defined and clearly specified, instead there are varying interpretations stemming from the disagreements

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between the original founders of this methodology. The basic premise was to connect theory to evidence through engagement of data. However, the two leading academics, Glaser and Strauss, responsible for the introduction of this approach in 1976 have since disagreed, resulting in differences in approaches towards conducting and analysing research generated from grounded theory. Thus Glaser's posits that grounded analysis facilitates theory generation, Strauss's in contrast believes the approach should focus upon theory verification (Grbich, 2007:72). This led the author to conclude that for this research grounded theory was not the approach to be undertaken.

3.7.2 Narrative Analysis

Narrative analysis according to Hjamns (1996:103-104) involves a description of formal narrative structure this approach can be used for quantitative and qualitative in contrast to other approaches such as IPA. The focus is on characters and their issues, choices, conflicts, complications and developments. Elliot notes (2005) that the characters are the carriers of the story, central to the analysis rather than the text itself. This approach relies on the analyst reconstructing the story and therefore the analyst has to be a confident in reading narratives. The advantage of this approach is that the data can be categorised into themes from the sample. In order to provide the details of life experiences in the form of a story, individuals are forced to reflect on those experiences, to selecting the relevant aspects, and to order them into a coherent whole. It is this process of reflection and making sense out of experience that makes telling stories a meaning making activity (Elliot, 2005: 24). Thus the researcher is actively engaged in the narrative without the imposition of a formal framework (Murray, 2008:121). In a previous study undertaken by Bossard and Peterson (2005:12) they were interested in how the repatriates themselves experience the adjustment process. Twenty interviews were conducted and analysed utilising narrative accounts. The results were organised into two themes self-orientated insights and the repatriates' insights into the strength and weaknesses of their company practices and policies when returning home. However, their respondents were limited to repatriates and do not offer a company perspective. Remenyi et al (2005:185) argue that narrative approaches must be viewed with caution to determine whether the story offers a contribution to knowledge. Contribution to

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knowledge forms a crucial component to the Professional Doctorate and therefore this approach was rejected.

3.7.3 Content Analysis

Neuendorf (2002:1) defines content analysis as ‘the systematic, objective, quantitative analysis of message characteristics.’ Content analysis has been used successfully in the past to review historical artefacts to test hypotheses. Growing use of this technique is linked to the advancement of software allowing speedy basic analysis. The focus of content analysis remains analysing key phrases or words in a systematic approach to maintain objectivity of the data. However, the analysis can be time consuming, costly and requiring the diligence of well-documented data in the form of field notes or transcripts. Furthermore, Neuendorf (2002:4) highlights it is not always easy to determine whether content analysis is the correct description for the analysis undertaken citing several studies that have erroneously applied the term.

This approach is distinct from content analysis which attempts to meet scientific standards and falls within a positivism paradigm (Neuendorf, 2002:11). Therefore content analysis was rejected as this approach does not sit comfortably with the researcher’s aims of the study to provide a greater insight into the repatriation process.

3.7.4 Interpretative Phenomenological Analysis (IPA)

More recently within the field of psychological research the use of IPA has come to the fore as an approach to analyse qualitative data generated by interviews (Smith, 2008: Smith & Osborn, 2007: Willig 2008). IPA’s routes lie within phenomenology and hermeneutics as well as in psychology related to subjective experience and personal accounts (Eatough & Smith, 2007: 179) which at first review positively reflects the author’s approach to research. Phenomenology is interested in the ways human beings gain knowledge of the world around them. IPA acknowledges that it is impossible to gain direct access to research participants’ life worlds, even though it aims to explore the research participants’ life experience. Therefore it is always an interpretation of the participant’s experience. The central tenet is to capture the quality and texture of individual experience (Willig 2008:51). Founded by Jonathan Smith (1997:189) ‘an

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attempt to unravel the meanings contained in accounts through process of interpretative engagement'. Steps within the analysis process allow the research to identify themes and integrate them into meaningful clusters first within and then across cases. Willig (2008:57) posits IPA's popularity has been in part attributed to the provision of detailed description of the analytic process.

As there is with any research approach there are limitations using IPA. The fact that IPA is a relatively new approach to analysis may lead to a certain degree of uncertainty regarding utilising this approach. Since phenomenology is interested in the actual experience itself, it must assume that language provides the participants with the necessary tools to capture that experience. In other words, IPA relies upon the representational validity of language and that language adds meaning. However, IPA can be criticized for the suitability of the accounts as well as explanation versus description (Willig, 2008:66). Other criticisms could be claimed regarding the necessity for small sample size to allow for in-depth analysis. Nonetheless, IPA is a new and developing approach that leaves more room for creativity and freedom to explore on the part of the researcher who uses it, the opportunity to interpret the data to gain a greater understanding of the repatriation process outweighs the limitations of IPA.

3.8 Sample

Quantitative methods rely upon generalisability ensuring that the sample is representative. Qualitative studies involve smaller samples due to the time consuming nature of the collection and analysis therefore the sample may not be representative. However, a representative sample may not be a prerequisite to answering the research questions. Willig (2008:17) argues that if the study is a case study of an individual, group or organisation representativeness is not an issue. However, if we want to argue that the phenomenon is relevant to more people than our sample representativeness can be an issue. One way to address this issue is to incorporate further accumulative techniques such as allowing integration of other study's findings to draw wider conclusions.

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The organisation chosen was a banking institution known to the author and a contact within the organisation provided a potential convenient sample. However, after an initial positive beginning the world economy changed quite dramatically. Interviews were arranged and commenced in July 2008 to be completed by April 2009, whilst interviewees had initially consented to participate the main contact at the organisation was then impacted by the recession and further interviews became problematic. The opportunity arose to include a further banking institution as well as two leading technology companies enabling a small sample from each organisation to participate. However, the researcher has included only the interviews from the initial financial institution. The organisation in the study has an expatriate population of over 150 people. The company was chosen based on their expatriate profiles in that they regularly have at least 150 expatriates at any one time. The decision regarding how many repatriates to target is discussed within the sample.

Other factors affecting the final sample were dependent on numerous factors such as how practical it would be to research the entire expatriate population as well as constraints with regard to budget and time of the researcher influencing the sample choice. It is acknowledged that when conducting qualitative research, the sample size should remain small enough to allow thorough interpretation of the data (Eatough & Smith, 2007; Onwuegbuzie & Leech, 2007; Patton 2002; Smith, 2008).

In this case eight repatriate's interviews were conducted as well as organisational interviews with one IHR manager, two HR Business Partners representing home and two host HRBPs, as well as two line managers who represented both home and host line managers. Thus the final sample provided a rounded view of the repatriation process in order to highlight the various actors involved within the process. From the repatriation sample all of those interviewed were at manager grade and the majority fell within the age group of 30-39 years. Apart from one repatriate all employees had worked for their organisation for over 7 years and had returned from assignment between 4 to 12 months previously. However the sample averaged 11 months after repatriation. Only one repatriate had previous international experience. The HR and Line managers ages were between 30-59. The majority had worked for the organisation for over 10 years with

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multiple experiences of assignments in all but one case (please see table 9.2 demographic profile for further details).

How many interviews is “enough” is the subject of continued debate. However as previously outlined the sample in keeping with IPA should remain small to allow for a deeper level of analysis. Anderson (2009) posits that the ideal sample occurs when new interviews cease to add any new information, acknowledging that this is a matter of judgement on the part of the researcher, reaching this point is often noted to be saturation. The concept of saturation has been explored by Guest, Bunce and Johnson (2006) who argue that there is little practical advice for estimating sample sizes, prior to data collection. Using data from a study involving sixty in-depth interviews with women in two West African countries, they systematically document the degree of saturation and variability over the course of their analysis. From the results of their research they suggest that data saturation in general had occurred by the analysis of the twelfth interview. At this stage the remaining interviews that they analysed accounted for less than ten percent of any new codes. Within the repatriate sample the saturation of codes occurred after the sixth interview. However, a further three were conducted to abate any coding concerns.

There are various sampling techniques available from a qualitative approach samples can include; convenience, snowball, purposeful, judgement and quota samples (Anderson, 2009; Patton, 2002:243; Rememyi et al 2005:193). In this case a purposeful sample was favoured. Patton (2002) acknowledges that within purposeful sampling there are differing rationales for this strategy, intensity sampling allows information-rich cases that highlight the phenomenon of interest in this case, the researcher sought to explore data that would provide a good understanding of the repatriate process. Within this strategy it is noted that the sample is dependent upon saturation. The exact number of expatriates varies within the organisation on a monthly basis. Therefore, gaining accurate information can be difficult in determining an exact number of assignees at a given time (Howe-Walsh, 2007).

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In general data collection for IPA is usually purposive sampling, whereby participants are selected according to criteria of relevance to the research question (Willig, 2008; Smith 2008) In this instance the group of participants share the experience of being a repatriate or closely involved with the repatriate process which they have been asked to describe in an interview with the researcher.

The researcher wanted to explore the entire repatriation process during various stages of the repatriation via semi-structured interviews (Remenyi et al, 2005:46). The proposed strategy involved conducting interviews 6 months prior to repatriation and within 6 months of repatriation. However, the final respondents were all repatriated and interviewed within 12 months of their return. Timings of interviews precluded interviewing repatriates prior to repatriation reflected in the final methodology. The original research design was redesigned to take into account the particularly difficult external economic climate which was beyond the researcher's control (Edmondson & McManus, 2007: 1174).

All interviews, which lasted between 35 minutes to 1 hour 55 minutes, were recorded with the permission of the interviewee to allow for accurate transcription to interpret the findings. Verbatim transcripts were then analysed. Many authors argue (Anderson, 2004; Miles & Huberman, 1994; Patton, 2002; Smith, 2008; Willig, 2008) that qualitative data can be highly complex; the challenge becomes how to interpret the data. The interview can be analysed in a number of ways e.g. discourse analysis, grounded theory, interpretative phenomenological analysis (IPA) discussed previously.

Easterby-Smith et al (2008) propose that there are ways to supplement interviews. They suggest that it is possible to extract information using the critical incident technique. For example asking the respondent to track back to a particular instance and explain their actions and motives with specific regard to the instance. This was potentially useful when trying to determine elements of the repatriation process over a particular period that went well or the reverse and was utilised during some of the interviews.

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The final sample involved an exemplar bank, another global bank and a global IT company. However the final findings are restricted to the exemplar bank. Willig (2008:17) argues that if the study is a case study of an individual, group or organisation representativeness is not an issue.

3.9 DBA – practitioner focus

During the section describing narrative analysis the key reason for rejecting this approach was the issue of contribution to knowledge. In line with any doctorate contribution to knowledge is paramount. However, additionally the difference between studying for a PhD versus a professional Doctorate is undoubtedly the contribution to practice. The researcher's own experience as an international HR specialist gained over a decade has influenced the research design and resulting thesis. Pertinently for the researcher, the contribution to practice is as important and arguably inextricably linked with the contribution to academic knowledge. Informing existing HR practices is fundamental to this research.

The research questions posed have generated key themes which are presented in the following chapter which also discusses the data analysis method adopted.

Chapter 4: Findings

4. Findings

This chapter collates the data of fifteen in-depth interviews within a large banking organisation. These comprised of eight interviews with repatriates, an International HR manager, four HR Business Partners and two line managers of repatriates. The collected research material is disseminated into a number of themes (Table 4.1). Each theme is reported incorporating the verbatim transcripts from the repatriates interviews as well as the IHR manager, line managers and HRBPs perspective.

The aims of the research were to provide greater insight into the repatriation process to develop a greater understanding of the lived experiences of the individual repatriates and those providing repatriation services. This followed research questions that incorporated exploring the view of not only the repatriate but also other stakeholders within the process:

What is the individuals' experience?

What is the HR professionals' experience?

What is the International HR's experience?

What is the line managers' of repatriate's experience?

The data was analysed using an interpretative phenomenological approach (IPA) following steps within the analysis process to allow the researcher to identify themes and integrate them into meaningful clusters first within each interview and then across cases. Willig (2008:57) posits Interpretative Phenomenological Analysis has increased in popularity in part due to the provision of detailed description of the analytic process, for this research the analysis was conducted in accordance with the guidelines offered by Smith and Osborn (2008:67) and Willig (2008). According to Smith (2007) the central tenet of this type of analysis is to provide meaning to the respondent's views rather than just analysing the frequency of occurring themes.

The interviews were transcribed verbatim then the scripts were read and re-read. The first stage of analysis produced wide ranging unfocused notes that reflected initial thoughts and observations of the participants: associations such as the timing of

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repatriation discussions; the lack of debriefing; identifying handoffs between different organisational stakeholders, and resulted in annotations which were recorded in the left margin. This is different from open coding used in grounded theory where the notes are documenting issues that come up from the research questions in order to build and explore a theoretical analysis from what has been discovered through the research (Smith 2008:82). Thus a framework was adopted to structure the data.

The second stage of analysis required identification of themes which were recorded in the right margin. At this stage both process and content of the experience were evident. It included timing; the assignment policy; concerns regarding a return position; the current economic outlook; tax support; and schooling were recurrent themes. The third stage involved an attempt to introduce structure into the analysis. The researcher listed the themes identified in stage 2 and then thought about them in relation to one another. This required the researcher to move back and forth between the data. The third and subsequent fourth stage of the research brings together a summary table of the structured themes, with quotations that illustrate each theme an example is listed below. The summary table includes themes that capture the repatriate's experience of the repatriation process under investigation.

Table 4.1 Summary of themes

Theme	Description
Timing	Timing of the repatriation discussion, 6 months prior, 3 months, 1 month etc.
Policy	Repatriation policy influence as part of the initial decision to undertake an assignment
Return position	No guarantees of a return job
Economic climate	Worldwide recession
Commitment	Individual and organisational
Support activities	Family support, tax advice, relocation
Organisational stakeholders	Role within repatriation process

The following section analyses the contents of the repatriation policy.

Chapter 4: Findings

4.1 Repatriation Policy

This section will describe the policy which sets out what should happen in terms of the repatriation process highlighted in italics. It is important at this stage to affirm that this is the only document available to all stakeholders involved within the repatriation process. The repatriation policy forms part of the international assignment policy which has not been updated for some time. The wording of the policy clearly sets out the following objectives:

- *to minimise concerns about a career when returning;*
- *to help retain internationally experienced employees after their assignment;*
- *to encourage others to accept international assignments as they see returning assignees successfully placed and professionally managed;*
- *to transfer valuable knowledge and skills gained during the assignment to the home location business.*

The policy seeks to outline the assistance provided by the organisation in terms of the following: career progression; relocation costs and benefits; repatriation allowance; international assignment and repatriation allowance for consecutive assignments; education assistance; resignation or dismissal for cause; temporary accommodation; termination of assignment (redundancy); redeployment. Further elaboration of the content of the repatriation is outline below.

4.1.1 Career progression:

'At least six months before the end of the assignment the assignee and their line manager/business will review the assignment objectives and discuss the next role (at this stage extending the existing assignment is discussed). The assignee is encouraged to identify positions in the home country with assistance from their home line/business manager therefore responsibility is placed upon the repatriate to identify a role.

The length of the assignment is clearly indentified in advance. The expectation is that at the end of the assignment the assignee will return to their home country where the

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company will consider them for a job that reflects their abilities, skills and experience however the repatriate is again left to identify a role.

4.1.2. Relocation costs and benefits

This part of the policy outlines the benefits provided with regard to returning home. *‘The repatriate can expect the same arrangements regarding transport of themselves and family as well as their personal and household effects.’* Assistance is provided regarding tax advice to the end of the tax year(s) after repatriation however, it is common for issues to spill into the following year which is not considered.

4.1.3. Repatriation allowance

On completion of the assignment *‘a payment is made in line with tax compliance requirements.’* The amount is paid with the first month’s salary after the assignee returns to their home country. Several assignees have stated frustration with when the payment is received. The calculation is undertaken by IHR and passed to payroll. However, there appears to be a delay in the payment reaching the repatriate causing unnecessary angst.

4.1.4 International assignment and Repatriation allowance – consecutive assignments.

If the assignee is undertaking back to back long term assignments then they are paid their repatriation allowance at the beginning of the second assignment.

4.1.5 Education assistance

Any assistance provided during the assignment to educate children in the host or home location ceases upon return. There is no mention of continuity of education for children which can have a significant effect with regard to timings of the repatriation.

4.1.6 Resignation or dismissal for cause

Should the assignee resign before the end of the assignment or there is early termination of contract due to misconduct, the assignee is liable for all associated costs to transfer to another country or repatriate.

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If the resignation is due to personal circumstances then *‘the assignee is able to discuss the situation with HR and/or line on a case by case basis.’* Therefore allowing some room for negotiation to take into account the personal situation of the repatriate.

4.1.7 Temporary accommodation

Temporary accommodation is provided for a maximum of 28 days upon return. However, assignees are strongly encouraged to organise home country accommodation to negate this benefit. At least two repatriates discussed using this benefit during the interviews. Problems occurred when trying to extend the time in the rented accommodation. When rental agreements involving the repatriate’s home residence do not expire within the 28 days of their return they are potentially homeless until the tenant vacates, it was difficult to extend not because of inflexibility from the organisation but due to the process breaking down. Communication between IHR had not taken into account any changes to the assigned IHR contact who had not passed on the information in time. Thus the repatriate had been threatened with eviction.

4.1.8 Termination of Assignment (Redundancy)

The *‘business bares the costs to repatriate the assignee and their family within one month of termination.’* The benefits include: *the repatriation allowance; shipment of goods; up to 28 days of temporary accommodation, flights home and tax assistance for the year of termination.’* Exceptional circumstances such as tenancy agreement in home country are considered on a case by case basis.

If the assignee chooses to stay in the host country then no cash payment is made in lieu of repatriation expenses.’

The organisation will seek to redeploy the assignee if their position is made redundant. However there are no details of who within the organisation will assist with this process within the policy.

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4.1.9 Redeployment

Redeployment is discussed after the assignee and line manager have explored all other employment opportunities, but again it is not clearly stated as to who would conduct discussion. However, it is deemed unlikely that there are no alternative roles. Alternatives to redundancy such as extending the assignment or localising the assignee would be considered.

4.1.10 Localisation

Reference to localisation is made within the international assignment policy. This is separate from the repatriation previously outlined but forms part of the overall international assignment policy. In certain situations an assignee undertakes a transfer or permanent career move to another location (it is not likely that they will ever return). The following examples are provided of what might happen:

- *the home location has a small office and the assignee is moving to a much bigger office;*
- *the department is moving to another country;*
- *the assignee is moving indefinitely to establish a new business overseas;*
- *there may no longer be a role for the assignee in their home country but an opportunity exists overseas.*

At the end of an assignment the assignee or business may prefer the assignee to remain in the host country for an extended period of time. However, this should not be confused with extending an assignment the policy refers to localisation as a permanent transfer and moving on to local terms and conditions of employment in the host location. Typically this situation would arise after the assignee has been in the host location for three years. Moreover, assignees can become locals as soon as their assignment begins, this option is referred to as a hybrid arrangement later the chapter.

In general the following reasons for localisations are:

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- *to meet business objectives;*
- *the assignee is required;*
- *to achieve equality with local peers;*
- *to simplify compensation arrangements;*
- *individual wishes to localise/relocate permanently to another country.*

The policy provides guidance regarding the timing of localisation discussions with the intention that discussions should commence six to twelve months prior to the proposed end of assignment, to allow for issues to be resolved in transferring onto a local package. *‘All assignees are on notice that they will localise after three years at the time the assignment commences, should they not return home after the three year period of time.’* (International Assignment policy)

4.1.11 Policy Summary

Overall the policy discusses the elements a repatriate would expect from the employer in terms of repatriation. What is missing is consideration of how the policy is transferred into a process of practices that the repatriate experiences. This is highlighted by the lack of detail surrounding who is responsible other than the repatriate to drive elements of the process.

4.2 Repatriation process

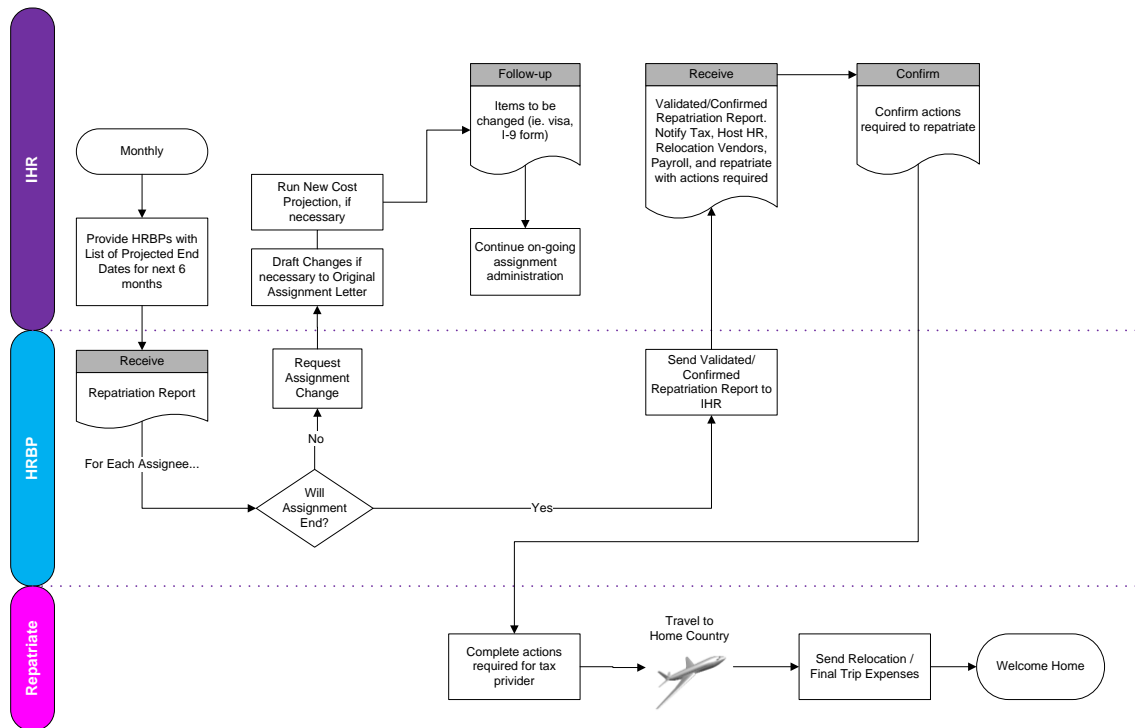
The findings of the research are highlighted using transcribes from the interviews. The repatriate process and policy arguably is owned by IHR. However, there are various stakeholders including the home and host line managers and HRBPs who have significant influence over the interpretation of the policy. The IHR department used to form part of HR shared services, however recently this has moved to within the Remuneration and Benefits department where the policy is owned. Moreover, the operational details of the policy to highlight who is responsible for which part of the process appear to be precluded from the policy. In addition the repatriates, line and HRBP’s interpretation of the policy is not always consistent. There is a paradox between the types of services offered by the IHR function which could cause

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misunderstanding by other stakeholders regarding how IHR could add value to the business. IHR is viewed as a transactional service, however there are complex issues surrounding expatriates such as their pay and tax, net to net calculations, contracts etc which could be viewed as far more transformational HR.

The following process flow diagram provides clarity to the intended process and the perceived stakeholders. There are some notable omissions within the intended process diagram such as how the return position is identified. Each theme previously identified is discussed in this section incorporating the stakeholder's views within each of the three master themes. This leads to a revised repatriation process flow diagram at the end of this chapter.

Figure 4.1 Intended Repatriation Process flow diagram



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Ultimately IHR are following the policy and are bound by the contents, the issue is how the policy is interpreted. This could lead to the perception that as IHR stick to the policy resulting in the perception that IHR are inflexible from the line, HRBP and repatriates' view. However, the policy does not provide the detail or lines of responsibility to be able to counter this perception and therefore IHR is viewed as a transactional service, however there are complex issues surrounding expatriates such as their pay and tax, net to net calculations, contracts etc and indeed return position which could be viewed as far more transformational HR.

'The IHR function is very much process orientated so they will do what you ask of them to do. Um... they will follow their process all the technical side of looking after the expats but the soft side of that which is the most important side of that...they don't touch i.e. what are they doing while they are out there, whose linking them to the home business...around things like their appraisal, how are they doing are they doing the right stuff for when they come back are they keeping up their network...profile for when they come back that sort of stuff, they probably wouldn't know what all that was about it's not on their radar and that's, that's not what they are all about...it's not on their radar and that's...they need to get the other... you know whilst it isn't right in the hierarchy of things ...you need to get the shared service stuff right... in the value added how useful it is to the person and...and...to the home the business it's the soft stuff that's most important.' (014 HRBP p2, 119-33)

This view reflects IHR's standing as a transactional function undertaking the daily administration of an assignment such as notifying the shippers of removal requirements preparing the cost projections for the assignment etc. whereas the HRBPs deliver the value added piece offering transformational HR activities described as appraisals and performance reviews. However, during the findings section this view is challenged. Arguably the delivery of the technical side of repatriate is important; nonetheless this merely provides a superficial view of the complexity of the repatriation process. All of the HRBPs emphasised that the process only works well when there is an established

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relationship with the IHR function. The following quotes from HRBPS and line manager reinforce the view that IHR are a transactional service and raise the question ambiguity within the repatriation process.

'Service centre undertakes producing contracts and looks after admin side relocation activities handoff to HRBP...Totally relationship driven and how well you know the system... All boils down to communication.' (013 HRBP p1, 117-20)

It is a very unclear process as to who is responsible for what, you check in with IHR and then you're like OK...OK... then what should we do? We need to be challenged with the decision regarding the move...we initiate and it is not driven by IHR therefore there are inconsistencies they need to follow up more and update...we don't feed back to IHR so they don't call us...we just call them when we need things transactional...they just follow the process they are certainly not transformational...recently I sat through a whole days meeting to understand more but it is still not clear to me who does what of the process it is very confused. (015 HRBP p2, 111-22)

'The policy is handed down from the centre and I do think that there is very obvious tension and I do see that IHR get viewed as being too soft and not adhering to policy.' (018 p6, 126-29)

Challenging HRBPs and line manager's decisions certainly provides the opportunity for differing working practices to enhance the process. However, there is an assumption on the part of the IHR function, line managers and repatriates that the HRBPs understand the policy. Indeed some of the HRBP's whilst being critical of the expatriate policies did not have a clear understanding of the contents of the policy themselves.

'I don't know exactly what it says and that's my ignorance.' (016 HRBP p3, 119)

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Without a working knowledge of the policy alternative assignment arrangements can be offered by the line and HRBP such as localising an individual to the host country. This results in a myriad of issues with the individual not being dealt with consistently. Indeed as one HRBP states there will be a lot of issues in the future surrounding these individuals upon repatriation.

'there is a discussion about the resource and how you get from the UK outwards etc...so we have that conversation and we discuss all sorts of details about how we are going to do it...for and what sort of nature we would go for will it be an expat or some sort of local (removed from home payroll and treated as a local on local terms and conditions) or as an hybrid (some of the benefits of an expatriate assignment such as reduced housing, minimal tax assistance) ..um and broadly around the taxation and broadly around um...taxation implications and once we've got around to that stage we would notify the expat team and we would have to provide them information in rather unwieldy form um to the expat team um which... ur... to the expat team which they then use um...ur...to do the costing...' (006 Repatriate p5, l25-33)

'Probably misusing expat packages by sending people out on local deals (local terms and conditions removed from home payroll) who we eventually plan to repatriate...then they are lost... as they are localised...but we are intending to bring them back but to cut costs...um...but...this will come back to haunt us we really need to change the process and give more direction as to who owns what and we need IHR to provide quarterly follow up on expat/repat...the other thing that's missing is career mentors or career managers...when someone is out they have appraisals and that's up to host as home would not know (expatriates are removed from the home talent pool)...it's up to the individual to be responsible for providing the information regarding their performance...if they are on a full expat package we will know about them...but they do get lost...although a full expat package is easier to track.' (015 HRBP p2, l49; p3 l13)

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Indeed the use of localisation is clearly not aligned with the policy and in stark contrast to the intended practice (See 4.1.10). Those assignees offered hybrid arrangements are not offered the security of the international assignment policy where the assistance provided is clearly stated. Furthermore, they will not have been briefed regarding the practicalities of the assignment in terms of tax etc. What may potentially be perceived as a great career enhancing opportunity could in fact be career limiting after all the experience of long term assignees is fraught when identifying a return position.

From the repatriates perspective the repatriate policy did not form part of the decision making process in undertaking the assignment in the first place. In fact many of the repatriates confirmed that they had not given the policy a second thought for the return. The main focus for the repatriates was the initial excitement of the assignment.

‘We did know that removal was paid for and storage as that was all in there...I don’t remember weighing up what we would get coming back... the big adventure is going out you are going to a different country not knowing the language you know you’ve got this support to help you get established that did work really well... and coming back you just don’t think about it because it’s just too far ahead.’ (006 Repatriate p5, l25-33)

‘There’s no guarantee, I was fully aware of what went on and the repatriation policy that um... the bank was not obliged although this was not a regular this was a 3 year rotation 2 people on rotation for 3 years for a long, long time and it was kind of a given that you’d be, this was the bank, deemed to be a positive development for your career you’re not sent there to fill a gap but you are sent as part of your education process.’ (08 Repatriate, p6 l47-5; p7 l1-4)

The international assignment policy and in particular the repatriation section does not affect the decision to accept an assignment, perhaps mainly because this is too far in the future to consider. The stakeholders involved at this stage, key to the decisions surrounding extension or repatriation, are the home and host line manager. The host line

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manager may consider an extension, but the business case and budget have to be agreed; additionally a revised costing should be procured from IHR. Within the policy there is a finite time line for an individual to be on assignment and one of the concerns will be whether localisation should be the preferred option. However, the decision regarding which scenario is best for the business as well as the repatriate is partly dependent upon the relationship between each of the stakeholders affecting the process.

'Quite often what would happen there's always a massive debate what should happen is actually 6 months before you repat the discussion should be had as to whether you want to localise or do you want extend or do you want to be repatriated.... sort of thing and there's a degree that the decision is yours...but actually in reality that's not the case because invariably.... you know especially at the moment as expats are very expensive...invariably there is a massive drive to bring those costs down to localise people so if you're willing to localise fine.'
(04 Repatriate p8, 125-34)

'yeah the policy is pretty detailed, which gives you a sense of reassurance that there's a lot going on behind the scenes.. but again it's down to getting the basics right and I think that a lot of that is down to your incoming line manager of course because they've got to own that administration piece of you as it were and I said spent about 3 weeks just trying to sort out logs ons and access to the system.. um...yeah it just doesn't make you feel very valued'. (04 Repatriate p5, 110-17)

'I don't think we are joined up there at all I think we who is the manager the business manger back at home who actually is going to end up as the receiving business area in the future I think that data's all to cock half of it is missing and I don't think it's maintained and passed on to the business.' (019 Line manager p2, 119-24)

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The detail contained within the policy is challenged regarding its fit for purpose. The policy mirrors the assistance provided during the initial expatriation such as; providing assistance with shipments; house hunting; paid accommodation in host; the opportunity to rent you home and keep the income; travel to home country; pertinent allowances for miscellaneous items and tax assistance; the reverse is true for repatriation with minor adjustments to reflect increases in shipment allowances. Importantly the assignment letter provided to every expatriate as part of their terms and conditions refers to the assignment period e.g. 3 years. If an extension of the assignment is required then a new contract is produced by IHR. However, the terms will have been provided by the host HRBP and line manager. Previously it was noted that some HRBPs, in conjunction with the line, are flouting the policy in favour of hybrid assignments and localisation to provide less benefits and ultimately save costs.

'we are looking at the repatriation policy but for years it's remained the same it's basically been an undoing of the international assignment policy so it's literally what you get when you go out reversed um... and um... I would say even things for example such as and uplift of somebody's shipment was never considered it was just the same shipment that you get out that you get on the way back so very basic and um... it's always put into the assignment letter so that people know up front what they are going to get on repatriation and the only thing that has been made clearer I would say is the just the wording around whose responsibility the cost for repatriation is depending on whether you resign as an employee or even whether the company decides you need to go, so that the wording has kinda been clarified and again that is a sign of the times... (p2, 139-47, p311-10) at the moment home and host line manger are kinda left to their own devices to decide what's best for them and clearly they've only got their businesses interest at heart um... sometimes the assignee is probably left in the middle a little bit but again that's really.... we do say that.... home and host business partners role to facilitate that we do realise that there's kinda...of a bit of a lack of awareness sometimes and a lack of kinda global approach form

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home and host HR and they don't always and are not always fully engaged or and they're not always equally engaged'
(017 IHR p3, 141-47)

Again there is a sense that there are disconnects between the various stakeholders, but also that the policy itself is not flexible enough. Indeed, this has led to some HRBPs being involved with localising an individual removing them from home payroll and terms and conditions despite the intention of returning them as a local in order to avoid an expatriate assignment and the associated costs and process. Equally this leads to the individual and the organisation being exposed to problems in future years for issues such as succession planning, career development and tax.

4.3 Timing

Timing is central to the beginning of the repatriation process and therefore forms a central tenet of the themes. According to the repatriation process six months prior to their return date a notification flags the potential completion of the assignment. The International HR department (IHR) is responsible for generating data and notifying the appropriate stakeholders, including host HRBPs. The host HRBPs are tasked to facilitate discussion with the host line manager in order to decide whether the assignment might be extended, localised or repatriated. The data is coded using colours, green in the first instance to highlight the potential return and finally red to indicate the imminent return. The lead time of six months is required to determine whether the assignment might be extended or other possible scenarios including a return position or localising in the host country. At this stage the IHR department view the impending repatriation as fairly low priority. Indeed, their role is to notify the other stakeholders of the impending repatriation and wait for or the HRBP and line to confirm which scenario will apply to the expatriate. The IHR may prepare costings of the scenarios related to extending the assignment or localising. Once a decision has been made with regard to repatriation IHR liaise with the repatriate to initiate third party services, such as shipment back to home, terminating leases and assistance with tax. Seemingly a straightforward process for all parties involved.

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'As it gets more important three, two, months and one month when they go to the red stage people really start to take notice that goes to host HR, which is actually copied to home HR, however we are expecting host HR to be taking some kind of action because the assignee is in the location. However it does hinge a lot on the home HR perspective as well and the home line manager and the host line manger of course and the structures of the 2 home entities as it were so we send out the data to host HR they either do something with it...we...we... intend them to talk to the host line managers about it and in turn the host line manger to engage the home line manger and the home HRBP etc.. in reality it doesn't happen as smoothly as that it doesn't always happen at all an um... people get left on the assignment shelf as it were and stay on assignment and don't seem to be really picked in terms of any actions um... that's the worst case scenario so we do leave the ball within HR's court.' (017 IHR p2, 121-38)

Consequently the responsibility for the repatriation is passed to the host HRBPs to discuss with the host line managers. There are differing options; extend the assignment, repatriate or localise which then change the process and involvement of IHR such as costing an assignment extension or progressing the repatriation process. In this case the IHR department will provide assistance to cost the extension and provide supporting services to maintain the expatriate and any family in the host location. Nonetheless, the process relies on clear lines of communication between IHR, HRBPs and line managers.

'If there is a continued requirement for the role in the host location we do sometimes get involved with who can come out to fill their shoes and we also get involved sometimes in the um... repatriation package and salary etc.. but mainly that's HR and we do kinda devolve it to them which doesn't always work, but as soon as we hear back then what's happening so whether they are localising extending repatriating then we would take all the necessary actions and engage with the vendors at that stage...if we haven't already because most of the time we are engaged with the assignee on an ongoing basis throughout their assignment

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particularly in the host country, of course, so um...any questions that pop up...um...can be answered but otherwise we would start to engage with them at the point when it's confirmed what they are doing, although clearly they may have questions which they may be weighing up about localisation or repatriation and they need to talk that through with someone so and we are always there if they need to do that.'

(017 IHR p2, 140-47; p3,11 -10)

According to the HRBPs interviewed when an expatriate has a position to return to the process and timings of actions undertaken by each of the stakeholders runs smoothly. Indeed this view is supported by the line managers. However, the reality of the situation is questionable on the basis of the IHR manager's response and that of the repatriate's experiences.

'When we need a person to come back for business needs – that's the easiest they are simple... family come back and they take no time at all.' (015 HRBP p1, 113-15)

The repatriation process becomes problematic when the repatriate does not have a return position. There are several scenarios to explain why return positions may not be in place. One of the major reasons cited by the line and HRBPs is due to structural changes in the home location. Thus positions previously identified for the repatriate could now be redundant. Another reason argued by the HRBPs and line managers alike is that changes in home stakeholders cause the repatriate to be dropped from the radar. Therefore they may have been overlooked in planning and are simply forgotten by the business. Line and HRBPs frequently move around the business on average every two years.

'The line themselves can be poles apart those that have experiences and their treatment of assignees are very different to those that have no experience. Yeah I imagine HRBPS experienced come and go' (014 HRBP p5, 12-5)

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Therefore the likelihood that the same HRBP or even line manager remaining in the home location for the duration of the assignment significantly diminishes. All the repatriates interviewed were long term assignments averaging 3 years on assignment thus increasing the likelihood of changes to their home line and HRBP. Thus the result is inconsistent treatment of the repatriate in terms of finding a return position as well as the frustration shared by the host HR and line managers who still have the repatriate on assignment.

'On the way back, couldn't give a XXXX alright and that's a fundamental problem so the expat is left hanging of course that happens in my cases where I have an expat returning and one extending...I'm the one here not the receiving person not anyone from HR or IHR because no-one wants anything to do with it...I'm the one here doing the... the... joining of the dots because HR doesn't want anything to do with it...so there is a disconnect...and the person gets left and stranded...and really feels like a second class citizen and already had difficulty coming back from an assignment anyway so that that experience of the end of the process has not been good.' (018 Line manager p1, 139- 50; p2, 11)

'we did find and we structured internally to find him a suitable vacancy and he's done a fantastic job right it ended up well but it was really quite messy for 4 months and probably from his part I would imagine that he found it quite frustrating because he is you know in a displaced position he actually ended up getting his figures and stuff like that and he's notice and because we didn't know about him.' (019 Line manager p1, 150; p2, 118)

Thus the repatriate would have received information regarding a redundancy package in addition to the practicalities of moving back home with a family and been left with the impression that actually that he/she had been forgotten on assignment, which in reality is true.

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The second scenario is the where the problems are...someone who has been out there and all their supporters are gone...there may not be an obvious role for them to come back to. The process then becomes quite difficult as there is no ownership and basically everyone has gone since they were away and it's like we've all forgotten how great this person is. Then the process is really long, we have to re-interview again and everything has changed the structure has changed 3 times since I've been here in 2 yrs. (015 HRBP p1, 116-25)

From the repatriates perspective some strongly argue that they felt they had no control and found it difficult to work through from beginning to end of the repatriate process. This is influenced by the timing of the discussions surrounding whether the repatriate would extend their assignment or return home.

'Initial repatriation was not discussed until one week before it was due to end...so um, not on a timely basis I think I was supposed to get a six months head up and a three months heads up, but I didn't get any of that.... 'The repatriation came about because HR refused to roll the contract whereas my boss in London and XXXX were happy to roll...obviously they (bosses) didn't feel the need to go and speak to anyone contracts etc...Our point was that it was before Christmas and we had just had a baby we didn't have an apartment and Christmas was coming up etc... They extended the contract for three months and I had to make some decisions. It was pretty much how it went... (01 Repatriate p1, 110-24)

'I would have extended it, you can only go to 5 years before you become...um...on a domestic payroll our local payroll but um...yeah I would have done longer... I thought the expatriation and repatriation were all pretty disappointing as to how it was handled'... (08 Repatriate p1, 127-34)

The expatriate (008) noted that the support provided from HR had lead to his disappointment. He noted that he had to chase for information stating that:

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'there was a lot of work has to be done by myself, finding my own feet, there were a lot of kind people on the ground but there was no one who really took charge of it. (008 Repatriate p2, 15-8)

'I think that the problems were to do with timing and I think I need a clear answer about extending which was frustrating so we weren't quite sure if we should be pursuing school places or not'.. (06 Repatriate p8, 118-21)

'There was no discussion regarding the repat...it was a state of flux... the assignment was kinda indefinite, but I got married and my wife became pregnant so we wanted to return to the US after bonus season.' (03 Repatriate p1, 111-13)

Timing of the repatriation discussion is clearly fundamental in the repatriation process. However, crucial to the timing is identification of the return position and respective home line and HRBPs to assist with the process.

4.4 Return position/Career

The position upon return causes huge anxiety for the repatriate. The time taken to confirm the return position sometimes involves several months of negotiations which compounds the problem. Only one of the repatriates reported no issues with their return position as they worked for a global function that enabled the role to be undertaken in any location. Within the policy it clearly states that there are no specific guarantees with regard to a return position. Many of the repatriates had not considered the job they would return to. However, the perception from the repatriates was that there is an unwritten rule that the bank has looked after everyone previously on assignment and therefore the bank will look after the current repatriate and find a new position.

'I had to do that all myself there was such as balls up, in the sense that I didn't get any updates from HR...me looking for 6 months making phone calls meetings seeing where we end up.. um.. I did manage to get a job doing what I wanted to do, yes I did.. um.. but it was exactly that lucky, if I had been out there now and

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we got to 6 months and no one had said anything I would be screwed as there are no jobs in London therefore forcing me to go local in terms of local.’ (02 Repatriate p4, l25-31)

‘Originally the intention was that I would be extended for up to a 6 month period, we discussed it mid-year with the appraisal and then obviously we acquired another organisation...um...and that meant that we had quite a lot more additional HR still at that time ur... um...there was a whole debate around where individuals were going to go and whether they would be pulled or not pulled...and I um...plan was that I would do 18 months and then repatriate and then they would look to at replace me locally but because of the way the integration was working at the time, the poor HR are always behind the curve...yes we are going to extend this..extend this in the two and half months before the end I was like I really must let me landlord know what’s going on and they said oh no we’re not going to extend it now because of the pooling..OK it would have been nice to have been told, but OK fine...um.. I think I wonder what would have happened if I had not have asked and then it went on and on and on because there was a role, another role in Asia that I had applied for...I had the opportunity for promotion back here...but there were other opportunities really...was not that keen to come back at the time and they were like oh well we can keep the job open for you in London... as a result it got pushed back and back and back and I think it was only 2 and half weeks I think it was before I got my due end date that it was actually officially confirmed that it was happening, I hadn’t done much prior to that 2 and half weeks it all happened very quickly at that stage.’ (004 Repatriate p1, l15-42)

The repatriate clearly feels that a decision was only made from their constant questioning of the return options. Opportunities for promotion based on newly acquired skills were not part of the rationale for the final return position. The repatriate was clearly discussing promotion options in other localities. However, securing a return position was in part due to the previous home track record.

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Disappointingly from the repatriate's view the decision did not take into account newly acquired skills, but was based on their previous track record. Previous reputation was the major contributory factor in securing a return position which is discussed by other repatriates.

'A role was identified due to restructure, if I had less reputational character it would have been less easy.' (003 Repatriate p2, l23-24)

'I would say in terms of career prospective that could have been done better because it feels like I went out there and at times some of it hasn't really been recognised other than he's been out there for a couple of years...this wasn't a secondment... real expat package this was really going out there doing their job.' (05 Repatriate p3, l44-47; p4,l1-3)

A contributory factor to last minute decisions regarding the return position according to some of the HRBPs is the accuracy of the data generated by IHR to highlight repatriation dates.

'You would be completely reliant on interactions between the business and you would like to be reliant if you had it on the sort of accurate data...and...ur... accurate data that you might get from the IHR team that you might get from them but that doesn't really happen at all....they are beginning to try to send out a regular data, but it's the quality and accuracy of that data that is the problem... so they are working towards that I would say...' (016 HRBP p2, l4-13)

'I'm sure in terms of our HR function that in the team that looks after the expats abroad and stuff that like there must be that there must be that data but it doesn't appear to be shared with the attachment to which business area it is.' (019 Line manager p2, l29-33)

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There are differing perspectives regarding when and who should initiate which piece of the process, the role of line management within the first stage of the repatriation process highlights some anomalies. IHR would like the line to be involved sooner whereas the contrary view is shared by some of the HRBPs. The HRBPS report that the lines view and subsequent success of the process is in part due to the line managers' previous experience managing previous repatriates.

'I think engaging line management upfront um with kinda the six months stay definitely, we do leave it to HR it doesn't always work often the line manger is engaged with the employee and does know what the kinda plan is going to be but for whatever reason er... if not forced into a decision will probably delay maybe and just make it work for their particular business at the time so we (IHR) er...really sometimes should take the bull by the horns and contact the line manager directly and discuss some of the issues, because some of the issues are very complex we going through the HR channel and HR even the business partners may not necessarily have an expat before or they don't understand some of the issues so some of the timing issues even to do with you know if they ended the assignment a little earlier there could be massive tax savings... if we could talk directly to the line manger it would help a lot and it would um... I think it would be focus the decision making a little more I think that sometimes its' allowed to flounder a little.' (017 IHR p3, 115-32)

Indeed the line managers confirmed that despite over 50 years' experience within the same bank, on average they remain in a role for 2 to 3 years. Likewise the HRBPS interviewed and further discussions with the line reinforced the view that 2 to 3 years was indeed the average for HRBPs tenure in a role.

4.5 Economic environment

During the course of the research the economy has taken a large downturn. The cost of an expatriate is approximately 4 – 5 times their salary noted within the literature and during times of cost cutting the expatriate population could be viewed as a sensible

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place to reduce headcount. The economic climate is noted during the latter interviews as having a significant effect upon the organisation that they were returning to and potential return positions. This in turn has had an effect upon the view of the repatriates relating to their commitment towards the organisation and likewise their feelings regarding how they have experienced the repatriation process.

Whilst some repatriates were very damning of their treatment they continued to report high commitment towards the organisation. An assignment is perceived by many as a reward and a great opportunity demonstrating your commitment as an individual to the organisation. From the organisation's perspective some repatriates described an assignment as a sacrifice from the company perspective due to the expensive nature of an assignment, highlighting the organisation's commitment towards the individual.

Commitment to the company because they are being so nice to you sending you out there... somewhere glamorous... I don't think there are many people that would say no to it...unless they are not very adventurous... (06 Repatriate p6, 141-44)

'There were inconveniences...I am a lifer... the company has been good to me it would have to be something bizarre for me to walk away.' (07 Repatriate p7, 28-29)

'I would say it has enhanced my commitment towards the organisation... Commitment I would say is being dedicated to something believing in it and wanting to deliver and do your best really...um... I think the fact that I got to go on assignment demonstrates their level of commitment because there is a big cost associated to that.' (03 Repatriate p2,110-15)

'Well.. I was going to say in the current environment it is difficult to say. It definitely strengthened my allegiances because I felt like the organisation were investing in me...to go...and therefore it was...you know...let's face it it's

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business...I'm not going to get emotional about it...but... it was a nice thing to do and the fact that they invested so much money in... they... it was a nice pat on the back...I felt that it was a nice thing to do.' (05 Repatriate p7, 17-14)

Arguably commitment amongst the repatriates remains high however, the longer term effects of the expatriation and repatriation is not known.

'Retention is not monitored we are aware that we should do but I think the main thing that highlighted that sadly was last year in 2007 we had a number of people who resigned whilst out on assignment, people were poached while out on assignment and um.... I think that brought it home to us, saying that I think it's (monitoring retention) a little low down on the list of priorities but we do...er... we are aware that we do need to do that.' (017 p4, 134-40)

There is a lack of data to track the longer term retention of the repatriate. Moreover, if the repatriate experience was the cause of resignation it is unlikely to be fed back to the IHR department as there is no existing process in place for this feedback. Similarly there is no process in place to provide a debrief session in order to capture the repatriates experience not only of the process but additionally of their expatriate experience.

4.6 Support activities

Issues with support during the repatriate phase are noted by all repatriates. This is compounded by repatriates that were accompanied by a partner and family as particularly problematic. The main concerns stemmed from continuity of children's education upon return to the disadvantage of the partner finding work upon their return. Repatriates report having to put pressure on the HR function to get involved with the repatriation process. Many repeated the view that there is a disconnect between HR functions and the line and that HR and IHR were working in competing arenas.

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'I think there is a....falling between 2 stools because you have IHR saying that's not my job and the line saying that's not my job and you as an individual having to sort it out yourself... the exiting line doesn't really care about you, it's like she's off thanks and bye.' (04 Repatriate p7, 125-30)

There are issues with repatriates wishing to extend their contract for reasons involving continuity of education for their children etc again leading to this issue of loss of control. Although some experienced HRBPs advocate that the family are an external factor that is beyond their control. Indeed some of the repatriates also reinforced the view that it would be easier to be single on assignment.

'I was obviously requesting an extension because of our son's circumstances, it took a little while for that to get sorted through the sausage decision making machine, but eventually I got clear it's not going to be possible ...so that was about probably 6 months before we were due to comeback...so we started looking for schools and things off our own initiative...and then as we approached 3 months before the end of the contract... I'm contacting HR, why have you not sent me the documentation for the initiation of return'...(06 Repatriate p3, 14-14)

As we don't employ the spouse and children it's beyond our control. It's not the family's choice to go in the first place. In terms of re-entry schools change of living, no help with house etc the surrounding mechanism causes problems for the parents who must worry about the repat. (013 Repatriate p1, 127-31)

'So people say that it's a lot easier if the persons single, there's a lot of truth to that, there's no health, private school big houses and demanding partners and all that it's actually about if there are the emotional issues stress induce because it does put you through it...it... takes you away from family and friends and the support circuit that you had we have a lot a stress.' (018 Line manager p7, 111-17)

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Another area of support cited by all the repatriates related to the tax assistance. Tax advice is included as part of the supporting activities offered to repatriates. Depending on the host location there are various tax liabilities. In most cases the issues are ongoing as it takes at least one full tax year to determine the individuals' and organisations' liabilities. The feedback from the repatriates is that the service provided falls short of their expectations.

'Yeah, every expat that's come back in the last six months has had their tax screwed up...they've come back and I don't know who sorts it out HR? But whoever it easy they come back on base rate tax and whoever it is, XXXX, we are all about to get hit with a few thousand pounds tax bill which is not really very helpful someone does not know what they are doing.....and we have been talking that there is problems – most people know that if you earn over £40K then you are not on basic rate tax, I think my daughter knows that and she's only just over a year old so that definitely is an issue that needs to be sorted...we have been talking to someone in the bank and they have said they will do something about it and they will foot the bills and we will pay them back. Obviously there is a way around that we will sort that out.' (02 Repatriate p7, l30-33; p8, l1-8)

'Tax dreadful, weird tax scenarios filed for extension due to tax equalisation issue. IHR tried to help but still have outstanding issues... Tax contact would answer basic questions but can't help with other scenarios such as wife.' (03 Repatriate p1, l28-29)

Although tax services are provided by a third party the repatriates view this service as part of IHR's role and therefore negativity surrounding the level of service equally has a negative effect upon their view of IHR. Indeed there are a myriad of third party providers for services relating to the repatriation initiated by IHR. Unfortunately for IHR their reputation can be tainted by a negative experience of any of the third party providers.

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The issue of who is responsible for which part of the repatriation process is a recurring theme from the data that arguably tarnishes everyone involved with the process. Perhaps more worryingly from the organisation's perspective the fact that not only is it key to the experience of the repatriate but it is also key to the experience of the HRBPS and line managers resulting frustration and ultimately time to deal with an individual's repatriation.

'Yes, repat doesn't know who to go to. Yes the one I am thinking about it was what's happen to my salary and the parallel salary and ultimately we did manage to see and get the HRBP, IHR or whatever to sort out but in terms of me knowing the contacts I don't know the contacts so when that happened I then start scratching my head and my HRBPS I went to him but then to get the connection to the IHR function that was quite well messy...not easy to find the right person.' (019 Line manager p5, l23-31)

4.7 Summary

The empirical data presented in this chapter reveal paradoxical connections between the stakeholders and the lines of communication within the repatriation process. The IHR manager would like to move to a more transformational service which appears to be supported by the line. However, the HRBPs appear to view IHR as far more transactional and believe this is how the process should work. Nevertheless, there is consistent agreement from all the stakeholders that the process is far from perfect. Thus the repatriates experience is somewhat fragmented, causing anxiety for the return position as well as inconsistency from their respective home/host line managers and HRBPs.

Once a position is secured there appears to be little follow up that captures the skills and knowledge gained by the repatriate. Indeed, any form of debrief to capture the experience seems to have been precluded from the process at all. This can result in not utilising the individuals' full capability and instead has the reverse effect that the repatriate feels they are viewed as just a burden.

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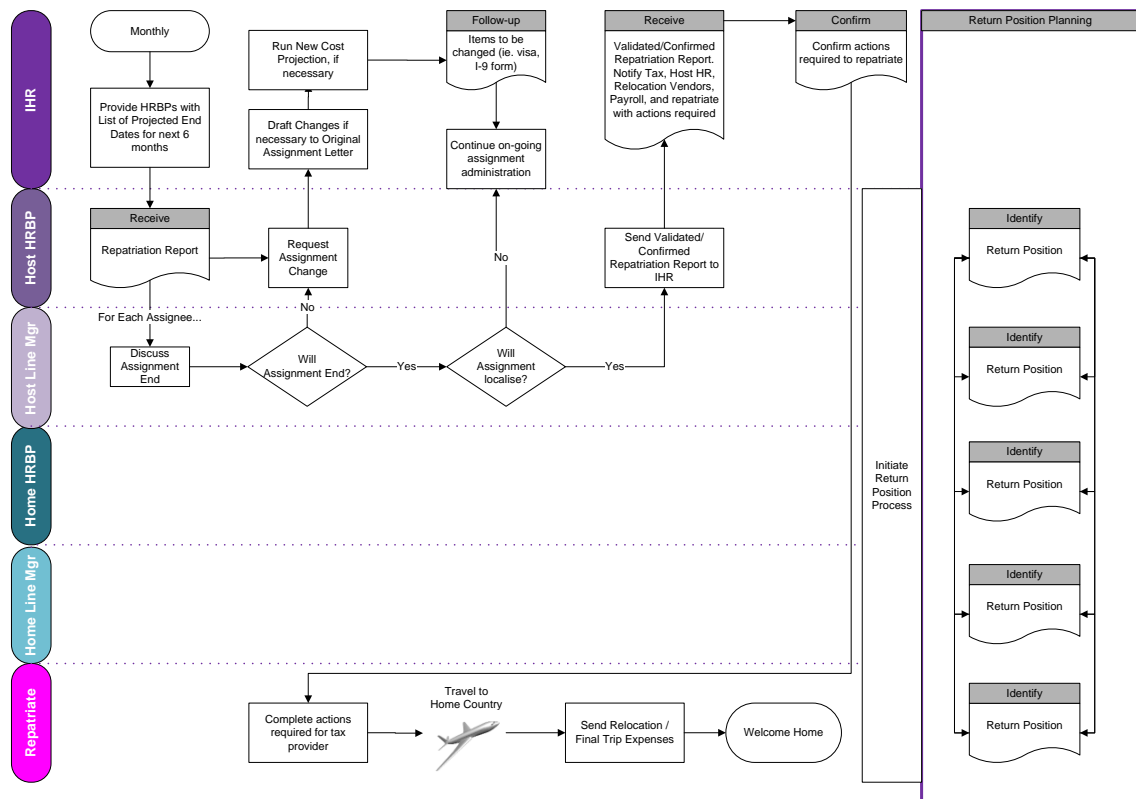
Whilst all the repatriates confirmed to being committed to the organisation there was a distinct acknowledgement of the current economic climate affecting their view. However, once repatriated it is clear from the interviews that the line, HRBPs and IHR do not conduct any follow up activities to monitor retention. Thus precluding any real sense of longer term commitment after the initial twelve month return period, this is a very disappointing situation for the amount of investment in an assignment.

From the repatriates' perspective there are too many stakeholders to interact with and many have commented that they would like one assigned person to cover tax questions, shipping arrangements, relocation etc. One major contributory factor to this overload of stakeholders stems from the fact that whilst the repatriate has been on assignment their home HRBP and line manager are very likely to have changed positions. The paradox remains that the IHR manager may be the only continuous organisational link for the repatriate. Perhaps this is an argument for making the IHR services far more transformational?

The following revised process flow diagram provides the opportunity to view a more realistic overview of the process and the complexities involved. The diagram confirms the number of stakeholders involved with the process. However, the most notable point is that the return position has a host of stakeholders within the decision making process, arguably IHR facilitate the process in conjunction with the other stakeholders. However, the findings highlight that any combination of stakeholder could be involved and indeed IHR may not be involved at all. Thus the diagram falls short of explaining who and how the decision is made regarding the return position, highlighted in the previous diagram.

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Figure 4.2 Revised Process Flow diagram



The next chapter will revisit the literature in conjunction with the findings outlined in this section to further the academic discussion surrounding repatriation.

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5. Discussion

This chapter brings together three elements that enhance our understanding of the repatriation process: HR policy; HR practice; and the delivery of HR processes. Each will be discussed in turn to highlight the link to current literature. The purpose is to identify how this empirical research furthers our academic understanding of the repatriation process.

The data came from assignees after return utilising a framework adopted as part of the analysis of IPA. This approach relies upon the representational validity of language and that language adds meaning. However, IPA can be criticized for the suitability of the accounts as well as explanation versus description (Willig, 2008:66). In order to minimise this concern during the analysis it was important to refer to the identified themes as well as reference to the authors understanding of the frameworks. Thus the opportunity to interpret the data to gain a greater understanding of the repatriation process outweighs the limitations of IPA.

The issue of finding a return position was the focus for all parts of the process and highlighted the issues of how difficult it can be to secure a role upon repatriation. The process of seeking a position was left to the host HRBP to facilitate with home HRBP and line managers. The literature provides scant regard for this level of detail; nonetheless the return position is arguably the single most important factor that all experiences are measured against from the repatriates' point of view. Thus repatriates do look to seek alternative positions with competitors once the countdown to repatriation has commenced in contrast to previous research (Kraimer & Wayne 2004). Worryingly in the case of all bar one of the repatriates the planning of the return position was problematic. Additionally the line managers and HRBPs reported the impact this has upon them in terms of time and their workload. In contrast, it was evident that where a return position was identified the process worked well.

Repatriation as an area of research over the last two decades has grown in academic interest (Tung, 1987; Black et al, 1992; Gregersen & Black, 1996; Hyder & Lovblad,

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2007; Sanchez Vidal et al 2008). However, there appears to be less successful progress in enhancing our understanding of why the experience is so poor. Much discussion has focused upon a deliberate repatriation process and reducing turnover intention (Kraimer & Wayne, 2004) as well as highlighting the importance of supporting activities during the repatriation process (Allen & Alvarez, 1998; Brewster et al 2007; Lazarova & Caliguiri, 2001; Suutari & Brewster 2003).

The discussion section considers the themes identified in the analysis in relation to the existing literature in the field (e.g. Black et al, 1992; Bossard & Peterson, 2005; Lazarova & Cerdin, 2007). From the repatriation adjustment framework offered by Black et al (1992) some useful reference points were noted that could assist repatriation adjustment. This model offers a valuable conceptual contribution that outlines a systematic approach to review the repatriation process introducing a theoretical underpinning to enhance our knowledge of repatriation. Reducing uncertainty through predictive and behavioural control formed the basic theoretical premise within the model highlighting the multifaceted nature of variables involved within the process. Nonetheless, the model requires further development to introduce a greater understanding of how this works in practice.

Additional theory contributes and enhances our understanding of the repatriation process. Tharenou's (2003: 491) research, introduces the idea of receptiveness towards an international work experience utilising SCCT. Her research identified the importance of personal agency (Can I do this) with expectancy, (If I do this will happen) thus individuals have an expectation relating to how the international assignment will benefit their future career. Likewise, upon repatriation the assignee seek support to identify a return position in order to progress their career. The perceived environment consisting of opportunities, support and barriers highlights the role HR plays in reducing negative influences which may detract from undertaking an assignment. Recognising the role HR can play in supporting the process is a crucial development in our understanding (Bossard & Peterson, 2005; Liu & Yuwen 2009).

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5.1 HR Policy and Practice

Arguably the importance of the repatriation policy is the foundation of the organisations intentions towards the repatriate. The policy document states the clear intention to:

- *to minimise concerns about a career when returning;*
- *to help retain internationally experienced employees after their assignment;*
- *to encourage others to accept international assignments as they see returning assignees successfully placed and professionally managed;*
- *to transfer valuable knowledge and skills gained during the assignment to the home location business.*

Consistency of HR policies have been demonstrated to improve performance (Purcell & Hutchinson, 2007). Providing HR solutions that enable an enhanced approach would benefit all stakeholders within the repatriation process (Kinnie et al 2005). Furthermore, grounded expectations of the repatriation activities for all stakeholders require synergy with HR policy and practice (Allen & Alvarez, 1999; Paik et al, 2002; Stevens et al, 2006; Suutari & Brewster, 2003). Thus, highlighting the need to provide further detail surrounding the intended implementation of the international assignment policy, which this research has found remains unclear equally to all organisational stakeholders.

Pre return expectations formed the central theme of Black et al's (1992) model. Further elaboration is provided from Paik et al (2002) who argued that setting expectations between HR and the assignee is crucial in order to reintegrate the repatriate back into the home location this links with the policy setting out prior to repatriation the assistance available. The policy provides clear guidance in terms of the assistance the repatriates can expect such as: return shipment; allowances; transportation; tax assistance etc. However, the findings again suggest that the delivery of the policy is less clear. The researcher suggests that previous literature does not go far enough in exposing the importance of delivery of HR policy and practice to support the repatriation process. The results of this research build upon the framework of Black and Gregersen (1992) in highlighting the need to develop a model that exposes finer examination of the repatriation process the gap in the literature is the importance of the delivery of HR.

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Whilst setting the repatriate's expectations is arguably the strength of URT there is a lack of consideration as to whom and how the delivery of the identified antecedents is undertaken. Only when HRM policies match the need of the repatriates will commitment towards the organisation be enhanced (Torka, 2004).

In this study the organisation was clear that there is no guaranteed 'return position' as stated in the policy. However, this is stark contrast to the intended policy which seeks to minimise future career concerns. Nevertheless, the policy statement appeared not to have an adverse affect upon the repatriate's decision to undertake an assignment in the first place. This could in part be explained by the fact that the repatriate policy is secondary to the international assignment policy. The focus of attention for the assignee and IHR will be to ensure that the new terms and conditions are understood and assistance is provided with the move to the host location and not about what is likely to happen upon return to the home location. The obligation from the organisation (arranging an assignment) has been fulfilled, no reference or thought regarding the impending repatriation at this stage, and in turn the expatriate is undertaking the assignment thus fulfilling their obligation to the organisation (Guest & Conway, 2002).

Another explanation, perhaps in part due to the strong ties formed with the host location, is that once undertaking an assignment the host line manager has an impact upon perceived organisational support (Coyle-Shapiro et al, 2006). If the relationship between the assignee and the host line manager is positive then this will in turn contribute positively towards turnover intentions (Schyns et al 2007). This finding is akin to research undertaken by Coyle-Shapiro and Morrow (2006) and Connelly et al (2007) that affective commitment is enhanced by the host locations level of support. However, if this support from home or host line manager, HRBP and IHR, is not evident, trust may be damaged (as Black et al predict) when expectations are not met.

5.2 Delivery of HR practices

It was noted within the literature that IHR practices take up more time than domestic HR practices, the type of support activities undertaken during repatriation. The policy

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outlines the assistance provided by the organisation in terms of the following: career progression; relocation costs and benefits; repatriation allowance; international assignment and repatriation allowance for consecutive assignments; education assistance; resignation or dismissal for cause; temporary accommodation; termination of assignment (redundancy); redeployment. Other than career progression the assistance provided is highly tangible and transactional. For example if an allowance is due such as repatriation allowance one month after return it is easy to confirm delivery. However, if as stated in the policy the continued career development of the repatriate is a fundamental objective of an assignment then the preclusion of any formal career planning within the actual process appears incongruent with the expectation. Thus some of the assistance provided is less tangible. However, if the intention is that the repatriate takes responsibility for the return position then personal factors such as greater self efficacy could well influence the repatriates' perception and capability to act. Perhaps the repatriate believes that the experience alone will in the long term add to enhancing their career. Thus exploring personal factors would be worthy of future research in order to identify which personal factors assist the repatriation process.

The overarching theme is that the detail is precluded from the policy and simple process flow document presented previously, who and how this assistance is delivered to the repatriate remains problematic in terms of responsibility. As noted previously in the literature, the delivery of HR is increasingly undertaken by the line manager (Dowling et al, 2008; Francis & Keegam, 2006; Kinnie et al, 2005; Perry & Kulik, 2008; Purcell & Hutichinson, 2007; Torka & Schyns, 2008). The issue of whom and how these supporting activities are delivered have a profound effect on how the repatriates perceived the repatriation process (Hyder & Lovblad, 2007; Lazarova & Cerdin, 2007; Paik et al, 2002). All of the repatriates reported disconnects between the organisational stakeholders. Expectations regarding the type and level of support appear to be misaligned to the perceived practices and policies (Allen & Alvarez, 1998; Suutari & Brewster, 2003). This could in part be the cause of changes to the HR function which has seen considerable restructuring during the last five years. IHR services were outsourced previously and have been brought into Remuneration and Benefits

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department (R & B). However, in order to be truly transformational one could argue that the changes have taken place are opportunistic rather than as part of a wider strategic plan (Ulrich et al 2009). The arguments for ensuring that changes to HR are strategically planned for support the view that piece meal changes are not effective (Boselie et al, 2009; Caliguri & Colakoglu, 2007). Failing to utilise the link between policy and strategy leads to questioning the strategic role of assignments. IHR does not appear to have formed part of the wider strategic plan for HR services or has not been communicated clearly enough to enable IHR to add real value to the business and work hand in hand with the HRBPs. Thus the perception that HR is not providing added value to their stakeholders, indeed the view that HR is 'self-service' becomes the norm from the line managers and repatriates. This leads to low expectations of HR services.

Arguably the major contribution of this research begins with the identification of multiple stakeholders: line managers' home and host; HRBPs' home and host, IHR and the repatriates' (Bonache et al, 2009). Thus highlighting the various complexities involved within the repatriation process: from identifying a return position to the final repatriation. The numerous perceptions of the stakeholders involved within the repatriation have furthered our understanding. The importance of each stakeholder and their contribution towards a successful repatriation is worthy of future research. Undoubtedly the level of complexity highlights the difficulty of transposing the findings into a model such as Black and Gregersen's framework (1992).

Interestingly one of the conclusions drawn from Black et al's work was that further research into the international experience of top management required investigation. Whilst one may presume that this refers to multiple international experience and positive repatriation adjustment there are also additional nuances we can add which relate to previous experience. The results of this research have highlighted the impact of previous international experience of other stakeholders, rather than just the repatriate (Lazarova & Cerdin, 2007). Thus when an HRBP had been on assignment their understanding and ability to work with the process is unsurprisingly simpler, they are able to manage the process more efficiently utilising their own experience. Equally, line

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managers who have international experience are far more likely to empathise with the repatriate and provide much greater support for the fundamental issues that appear inherent to a poor repatriation experience such as a lack of return position.

The issue of HRBPs lack of experience with international assignments is partly due to the fact that they frequently change roles within the organisation on average 2 – 3 years where they flex in and out of departments which use expatriates. Thus an HRBP may have been involved with the initial expatriation but not dealt with the repatriation or vice versa. The research found that it is rare for an HRBP or IHR to undertake an assignment. It was noted in the literature that previous international experience can aid the process (Paik et al, 2002). The likelihood is that if you have experienced an assignment at first hand you are more likely to know who can assist you during the process (which is one of the fundamental flaws of the existing process). Additionally, line managers are just as likely not to have experienced an assignment themselves, again leading to the requirement for more support to interpret the policy and manage the process.

The implication is that whilst it may not be possible to expose everyone to an international experience it is possible to provide greater understanding of the complexities involved with managing repatriation. Therefore this research highlights the need to provide training and re-education to HRBPs and line managers regarding implementation of the IHR policy which concurs with domestic literature (Sparrow 1996). Agreeing with Black et al's model, the researcher concurs that training in part could alleviate some of the current misunderstandings and communication surrounding the process and policy and would therefore benefit from further research.

Therefore continuity of stakeholders does come to the fore as an area which compounds the repatriation experience for the repatriate. Within the literature this issue is not explored and the subsequent effects are not explored. The findings of this research strongly indicate that continuity of stakeholders is fundamental to the overall repatriation experience and is worthy of future study. As well as being more inclined to provide support for example in terms of career planning, their (line managers and

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HRBPs) support is likely to be more appropriate. Furthermore the line and HRBPs are more likely to be receptive to the knowledge gained in the assignment process by an applicant on repatriation – but this latter point would require more focussed research. Thus extending the role of HR support activities and the affects of HR policy and practices upon the repatriation process and the various stakeholders involved within the process (Stevens et al, 2006; Tharenou, 2002).

A coordinated effort on the part of all the stakeholders was argued in the literature as central to successful repatriation (Lazarova & Cerdin, 2007). Indeed, there was unanimous agreement from the repatriates, HRBPS, line managers and IHR that the repatriation process required better guidance as to roles and responsibilities in order to achieve a more co-ordinated approach to improve the experience of all the stakeholders within the process.

Line managers reported that devolution of HR activities had reached such an extent that HR had become ‘Self service’ (018). The literature highlighted that this can become problematic as the line manager may have little experience of the management of international assignments (Dowling et al, 2008; Perry & Kulik, 2008). Certainly the line managers interviewed identified additional HR activities they were involved with during the repatriation phase that they believed were still the role of HR (Hailey et al, 2005). Whilst one might have assumed that the host line manager would have little involvement assisting with a return position as their interest is no longer served by a repatriate leaving their department it was apparent that there are frequent occurrences when the host line manager does in fact help the repatriate to secure a return position. In part this scenario could result from the obligation the line manager feels towards the repatriate. Arguably, the paradox remains that the devolvment to line has resulted in additional tasks that are potentially better placed within the HR function have by default become the responsibility of the line. In addition, without a clear policy and process it is equally reasonable to believe that there are gaps exasperating the lack of responsibility for the process. Therefore, is simply re-educating the line (Sparrow, 1996) enough to resolve the paradox or should a fundamental rethink of HR activities and roles and

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responsibility be defined even at the cost of taking back some of the devolved responsibility from the line?

The research presented in this thesis also draws attention to three related aspects of the HRM function and its associated processes: the Ulrich model of HR; International HRM; and consideration for the life-cycle management of international assignments. While the findings are based on a limited sample from one organisation, care should be exercised in seeking to generalise from them. However, tentative conclusions can be drawn which could form part of further research investigations.

In light of the findings one could question how international mobility features within the HR model presented by Ulrich and Waynebrock (2005). The debate regarding transactional and transformational practices forms the central tenet of Ulrich's work. What is less clear is whether consideration has been given to where international HR fits into this categorisation. Sparrow and Braun (2007:13) argue that the HR function MNCs need to build and HRBP structure that allows HRBPs to deal with HR issues that impact their business. The findings highlight the reluctance of HRBPs to take ownership of activities related to international assignments partly due to the lack of co-ordinated approach from the differing HR actors. This concurs with previous research that it is essential to have a co-ordinated approach in order to benefit the repatriation process (Lazarova & Cerdin, 2007).

The increasing interest in the development of business strategies and the link to human resources policies and practices (Sparrow et al, 2005) is arguably the corner stone of developing strategic International HRM. The challenge for the organisation is to adopt an approach towards IHRM that contribute to the business objectives.

Our theoretical understanding of International HRM has been enhanced by the identification of three broad theoretical approaches noted by Sparrow and Braun (2007). The first relates to the life-cycle models of change noting that as the organisation develops so too does the strategic orientation and consequent management of Human Resources. With reference to Adler and Ghadar's (1990, cited in Williams et al, 2009)

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well known model of the life-cycle approach identifies four phases that an organisation progress through including: domestic phase; multi-domestic phase; multinational phase; and global phase. Whilst the organisation could be described as part of reaching the last phase global it is questionable as to whether the company sits comfortably within this model. The global phase is noted to use international assignments to form part of the strategy to continue to develop managers. However, this assumes that organisations experience each of the phases in a linear way and arguably it is difficult from the findings of the research to determine whether international assignments are indeed used solely for developmental purposes. Moreover, the findings suggest that there is lack of clarity regarding tracking international assignments their intended purpose and ultimate success.

5.3 Summary

Over 20 years ago research indicated that dissatisfaction of the repatriation process was attributed to the policies and programs the organisation adopted (Tung, 1998). The focus of prior research lead to conclusions that the organisation often assumes that the repatriate has not undergone any major change since they left the home location and therefore minimal reintegration support was required. Some 20 years later slow progress has made regarding repatriation activities, remaining the least supported part of the international assignment experience.

The discussion section brings together prior research and literature with the findings of the study to further the research agenda regarding the repatriation experience. Whilst on the surface this study has highlighted that there is a clear international policy and practices surrounding the repatriation experience the perceived lack of co-ordinated approach undoubtedly stems from the lack of clarity regarding who is responsible for which parts of the process highlighted in the process flow diagrams.

This study's contribution to knowledge is that whilst great strides have been made to introduce systematic approaches to repatriation such as Black et al's model, the level of understanding has fallen short to aid practical recommendations to enhance the HR

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practices and policies that ultimately lead to an enhanced repatriation process. The identification of additional stakeholders involved within the repatriation process is a significant contribution to the academic debate surrounding expatriation. The discussion section highlights the importance of the home and host line manager as well as home and host HRBP and IHR function within the process acknowledging the importance of a co-ordinated approach.

Chapter 6: Conclusions

6. Conclusions

Chapter one introduced international assignments as a topic of research interest that has grown widely during the last two decades. The interest within the lifecycle of an expatriate has led to research into the final repatriation stage. The compelling argument that repatriation should entail a deliberate repatriation process in order to be successful was put forward due to the high attrition rates of repatriates consistent with the literature (Baruch et al, 2002; Black & Gregersen, 2007; Gribben, 2006). Thus the initial Research Question was to develop a greater understanding of the repatriation process. In order to answer the research question the following Research Objectives were posed:

To establish the current repatriation process within a selected organisation;

To identify organisational stakeholders and their perception of the repatriation process;

To critically evaluate repatriation policy and practices;

To determine the implications for the stakeholders.

The introductory chapter posed the reasons for assignments and how they are managed by the organisation. This led to consideration of HR's role within the repatriation process and the services HR provides to manage the repatriate. The expectation of the repatriate introduces one of the main theoretical foundations for international assignments URT. Setting expectations through organisational interventions has formed a crucial foundation for research. However, the researcher considered the benefits of additional theoretical concepts. SCCT was reviewed within the literature chapter providing an additional theoretical source to consider individual person factors that can contribute towards successful repatriations. The relationship the repatriate has with the organisation was discussed in order to consider the psychological contract and commitment theory. The role of HR practice and policy was linked to the management of the repatriation.

The literature led to further iteration of the research questions which evaluate the repatriation process, incorporating the following:

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What is the individuals' repatriation experience?

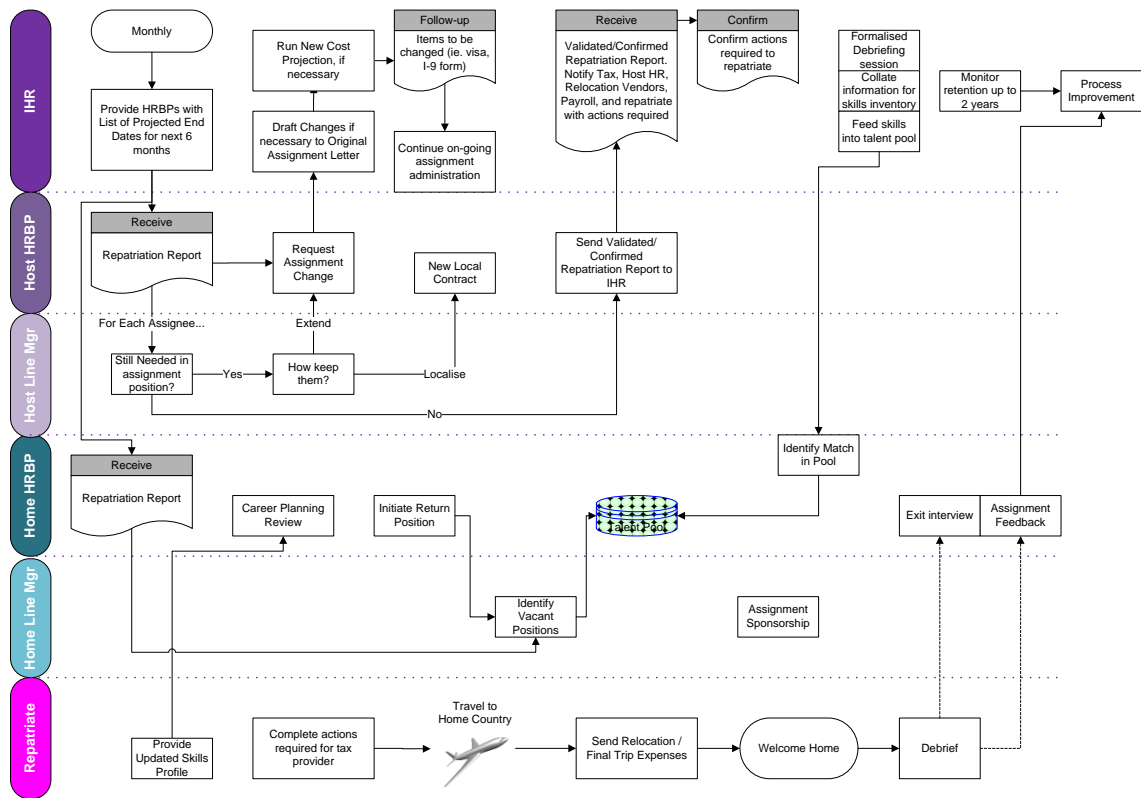
What is the HR professionals' repatriation experience?

What is the International HR's repatriation experience?

What is the line managers' repatriation experience?

The research objectives are revisited in order to highlight the findings from the research. Whilst considering the contribution this research makes to develop a greater understanding of the repatriation process.

Figure 6. 1 Final repatriation process diagram



6.1 To establish the current repatriation process within a selected organisation.

The process flow diagram highlights that the actual repatriation process is far more complex than the original process presented in the previous chapter. The diagram

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recognises the various stakeholders involved within the process and that reference to HRBPs includes home and host. The original diagram makes the assumption that the HRBP will receive the repatriation data regarding the projected end dates of assignments and act upon the information involving the home HRBP which is not the case. More importantly the role of the line manager, whether home and host, is highlighted within the revised process diagram. The reality involves discussion with the line manager to identify whether an extension is required or localisation of the repatriate. Interestingly, this demonstrates the issues surrounding the return position and the fact that responsibility for the actions could involve all of the stakeholders identified. During the course of the interviews the host line managers often took responsibility to assist securing a home position and actively engaged home line managers to achieve this. Surprisingly the HRBPs appear to be precluded from the discussions despite the expectation that they would drive the process upon receipt of a repatriate end of assignment date. Home line managers complained that they did not receive data from IHR to inform them of a potential repatriate, but within the current process the repatriates' end dates are provided to the HRBPs who should liaise with the both home and host line managers. Moreover, the actual experience for some of the repatriates was that they took responsibility for securing a return position through discussions with previous home line managers rather than any concerted effort on the part of the HR function. In contrast to Lazarova and Cerdin's research (2007) the result of this research leads to the conclusion that the IHR function and HRBPs do not actively engage with each other to facilitate securing a return position leaving the repatriate and line managers to resolve. There is a gap in HR planning to ensure that return positions are discussed within HR and that the HRBPs are involved with the career planning of the repatriate. Thus the importance of the strategic value of repatriates requires urgent attention (Caligiuri & Colakoglu, 2007).

The revised research questions and objectives have enabled the researcher to gain valuable insights into the delivery of repatriation tasks. The methods employed within this study have enabled the perceptions of the various stakeholders to be analysed using IPA. The advantage of this process is that detailed accounts of the participants'

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experiences have lead to formulating a more accurate understanding of the repatriation process. Thus, various factors regarding the lack of clarity surrounding roles and responsibilities have been identified from the research that leads to highlighting the repatriates' experience of a fragmented and inconsistent process. More importantly the study contributes to our academic understanding of the repatriation process and the gap between the HR policy and HR practices.

It remains the exception for the repatriation process to run smoothly. Ultimately the repatriation experience remains entirely dependent upon whether a return position is identified. This concurs with earlier research undertaken by Black et al (1992:230) that finding a new position is the most significant problematic area for the international assignee and their families. The central tenet of the repatriation policy seeks to highlight the benefits of an international assignment and provide career progression opportunities. In contrast the repatriates report a different experience. According to all respondents a predetermined return position is the exception. The participants all had examples of issues they have experienced due to unknown return position. Importantly an unidentified return position creates the same dissatisfaction for the other organisational stakeholders featured within the research.

Arguably the role of HR is to provide policy and practices that support the organisation. Within the repatriation process several supporting activities are noted some tangible i.e. relocation expenses, and others harder to identify such as the repatriate feeling valued. This research identifies the multiple stakeholders do not understand the intended process and that policy alone does not support the organisation. The contribution to academic knowledge is the disparity between policy and practice.

6.2 To critically evaluate repatriation policy and practices;

The current repatriation policy appears perfectly adequate at a superficial level. There are incidents of misinterpretation of the policy (Kinnie et al; 2005; Nishi et al, 2008) such as line managers believing that the assignment could be extended beyond the maximum long term assignment length rather than repatriating the individual. This

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results in very short period of time to make alternative arrangements to find a return position. The experience of those involved within the process highlights career planning to be nonexistent. There is no mechanism in place to harvest the skills and knowledge gained by the repatriate to feed back into home HR. Indeed the fact that assignees are removed from the home talent pool demonstrates the lack of HR planning.

In addition the lack of policy knowledge has lead to several HRBPs utilising hybrid assignments as a means to get around the current process, policy and cost of an assignment. Consequently, in the not too distant future, issues will arise regarding their return position as they fall between the cracks of responsibility. Furthermore, the researcher notes that there are potential cases for employees to claim discrimination due to less favourable terms of employment unless the use of hybrid assignments are scrutinised in greater detail. In addition, there are tax compliance issues to be uncovered from the incorrect use of hybrid assignments this is a potential time bomb as the Inland Revenue can impose fines that the organisation will be responsible to pay.

The situation where the policy is well understood outside the IHR group tends to reflect the individuals own assignment experience in line with previous research (Suutari & Brewster, 2003). The research has highlighted that organisational stakeholders with international experience are able to use their own knowledge to fuse an otherwise disconnected process. In contrast, those without experience spend vast amounts of time trying to determine who to contact and what is required. The more worrying aspect to this finding is that the line managers do not expect better service from HR. Their expectations appear to be so low that the managers expect to undertake HR activities themselves rather than seek support from HR who can assist with identifying return positions.

The question is how the HR department can add value and provide a co-ordinated approach to the activities that will assist the assignee and their family to successful repatriation. Moreover how HR provides a service that is valued raising the expectation of their stakeholders requires immediate action. The literature has introduced some

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additional theoretical contributions towards this goal none more so than the link between HRM and affective commitment as well as enhanced psychological contract.

Undoubtedly Tharenou's (2002) research contributes to exploring international work experiences. From the repatriates' perspective a greater understanding of an individuals' desire to undertake an assignment is aided by Tharenou's research. The notion that assignees are drawn to international work experiences in order to elicit change to their work environment negates the desire to reduce uncertainty, thus conflicting with URT. Nonetheless URT in conjunction to SCCT does provide the opportunity to develop our understanding of interventions to aid the international assignment experience such as pre-departure training as well as interventions to assist with repatriation such as debriefing repatriates. Indeed the findings of this research suggest that the actual experience of intended HR policy and practice and how it is perceived creates the platform to measure success in terms of the repatriates' experiences as well as the other main stakeholders such as the line managers and HRBPs.

6.3 To identify organisational stakeholders and their perception of the repatriation process.

It has become clear during the course of this research that the original organisational belief that the repatriation process is undertaken by IHR, HRBP and the repatriate, supported by previous research (Black & Gregersen, 2007), did not identify the multiple stakeholders involved within the process of repatriation. Clarification of all the stakeholders provides the opportunity to really understand the process from not only the repatriate's experience but each of the individuals involved. By highlighting the roles and responsibilities further advancement towards co-ordinated approach is more realistic. Thus our academic understanding is enhanced from identification of a multi stakeholder perspective.

The IHR function is currently viewed as a transactional service in line with current thinking that assignment activities can be delivered by service centres or outsourced

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(Lepak et al 2005; Ulrich et al , 2008). However, by trying to provide this service in a streamlined efficient process further opportunities to add value appear to be precluded such as matching repatriates skills to return positions. The label of being a transactional function arguably limits the capability of the function. Therefore viewing IHR as a centre of expertise, to quote Ulrich's research would provide opportunities to share knowledge. However, this assumes that each HR function operates as a team. Currently there appears to be disconnects between IHR and HRBPs representing a fragmented perception from repatriates and line managers alike.

6.4 To determine the implications for the stakeholders.

Surprisingly the lack of a return position and frustration experienced by the repatriate did not affect the individuals' commitment towards the organisation. Previous research conducted by Coyle-Shapiro and Kessler (2002) demonstrates that employees adjust their obligation and the fulfilment of them according to their perception of the organisations obligations. Thus the repatriate's expectation is so low in terms of what they expect from the organisation upon return, in part, explains the reaction of the repatriate's after all they have accepted an assignment based on the premise that there is no guaranteed return position. The fact they are still employed by the organisation exceeds their expectations. Whilst there is a clear assignment policy that highlights actions for the repatriation, the policy precludes details of whom and when discussion around the return position will take place as well as collating the knowledge and experience gained during the assignment. The lack of a return position is accepted as a reality of the policy and reflection of the existing economic climate. However, worryingly there appears to be scant regard for whether the assignment has been a success in terms of the company's objectives and the development of the repatriate.

This leads to the identification of several issues that are currently precluded from the process contributing to our academic understanding of the repatriation process:

1. clear lines of responsibility for the repatriation process;
2. identification of the stakeholders;
3. lack of knowledge management for the organisation;

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4. retention of skills by the organisation;
5. identification of a return position,
6. identification of home sponsor;
7. handoffs between stakeholders throughout the process;
8. repatriate talent pool;
9. success criteria of an expatriation.

Arguably, whilst commitment towards the organisation appears to be intact, one could speculate that affective commitment and the psychological contract could be damaged as the HRM practices and thus perceived organisational support do not appear to be strongly presented in the results of the study (Guest & Conway, 2002; Meyer et al, 2002; Torka & Scyns, in press). One explanation is that continuance commitment, especially in an economic downturn is strengthened and therefore the repatriate is less inclined to seek alternative employment. Another explanation is that undertaking an assignment has strengthened normative commitment and the repatriate feels obliged to stay with the organisation all be it in the short term due to the positive experience of the international assignment.

The findings section confirmed that the process managed by the IHR function does not include any form of data gathering to analyse the repatriates' performance whilst on assignment. Arguably this is the responsibility of the HRBPs. However, several anomalies are noted in that it appears that disconnects between home and host HRBPs result in performance information remaining within silos rather than available centrally. Thus, opportunities are lost to manage newly acquired skills and match them to positions within the bank globally. Moreover, whilst on assignment the expatriate is still 'out of sight out of mind' from home HR which will remain the norm unless greater responsibility for their eventual return forms part of an ongoing planned process of repatriation.

Arguably attempts to engage sponsoring managers to maintain home contact links would aid this process. However, the research has highlighted that this is the exception

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and acknowledges the issue of continuity of HRBP's and line managers alike, thus the process diagram has represented sponsorship as a remote box without reporting lines. There are issues with the basic transactional HR being precluded from the repatriation process identified above which furthers our academic knowledge of the process. Making greater use of the IHR function to actively collaborate with the HRBPs and line managers is one option to enhance the current process. Furthermore in order to achieve transformational HR a fundamental rethink of how the strategy for IHR fits with the overall HR strategy is required.

Career planning fulfils part of the rationale for accepting an assignment. However, further career opportunities are hindered by the repatriation process that does not capture nor attempt to match new career plans towards their competencies. SCCT provides an explanation as to why this does not appear to affect their commitment towards the organisation. The perceived enhancement of the repatriates' long term career satisfies the lack of career planning (Tharenou, 2002). This also relates to URT as the expectations of the repatriate are met once the position is found and in the case of this sample despite the short lead time experienced by the repatriates they remained employed by the organisation.

The dilemma of what constitutes a successful assignment from the individual's perspective as well as the organisation's appears to be precluded within the process at present. One way to capitalise on the positives of the assignment is via a mandatory debrief undertaken by IHR or HRBPs this is undoubtedly a missed opportunity. Not only in terms of future improvements to the repatriation experience but importantly to aid career planning.

6.5 Summary

Ultimately the repatriation experience remains dependent upon whether a return position is identified. This concurs with earlier research undertaken by Black et al (1992:230) that finding a new position is the most significant problematic area for the international assignee and their families. The paradox is that the central tenet of the repatriation

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policy seeks to highlight the benefits of an international assignment and provide career progression opportunities. In contrast the repatriates report a different experience. That said, the other clearly identified issue surrounds delivery of policy and practice and who is responsible for each part of the process. This research highlights that the IHR function is currently viewed as a transactional service and that assignment activities can be delivered by service centres or outsourced (Lepak et al 2005, Sparrow, 2007). However, by maintaining the services of IHR in-house, in a streamlined efficient process further opportunity to add value appears to be precluded. The perception of being a transactional function arguably limits the capability of the function. Therefore viewing IHR as a centre of expertise would provide opportunities to share knowledge.

It is surprising to find the lack of debriefing and career management by stakeholders is a consistent experience. The researcher suggests that this is a rich stream for future research as knowledge management appears to be (correctly) assumed in the literature (Bonache et al 2001; Lazarova & Tarique, 2005; Riusla & Suutari, 2004; Stevens et al, 2006) as a potential benefit to the organisation, and the evidence shows it appears to be ignored in this organisation.

Perhaps the most surprising result is that commitment towards the organisation remains strong amongst the sample. Although previous research as highlighted the link between HRM policy and practice and enhanced commitment where expectations are met in this study expectations of HR are clearly not met. This leads to the conclusion that expectations of HR are low from the repatriates' perspective as well as the line managers.

6.6 Implications for future research

Great strides have been made over the last couple of decades to further our understanding of international assignments (Bonache et al, 2009). Moreover the area of repatriation has started to come to the fore with attempts to provide practical support to aid retention and ultimately the experience of repatriation. Undoubtedly the major theoretical contribution of this research is the identification of the multiple stakeholder

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perspective within the repatriation process in conjunction with the development of existing theory. This is a departure from previous research which has focused upon the repatriate's experience. Thus identification of multiple stakeholders broadens our understanding of the process and furthers academic understanding of repatriation issues (Boselie et al, 2009; Nishi, 2008). This research has highlighted the disparity between HR policy and practice contributing to our academic understanding of the implications for the HR function. One avenue for future research would be to investigate HR practices and devolvement to line management (Francis & Keegan, 2006; Hailey et al, 2005; Bonache et al, 2009). Furthermore, the link between the psychological contract and HR policy and practice and commitment offers another perspective to research repatriation (Guest & Conway, 2002; Meyer et al, 2002; Torka & Schyns, in press).

Incorporating a wider scale study would aid our understanding of some of the issues raised in this study. One of the more surprising areas highlighted from the research is the continued commitment of the repatriates despite the poor experience. Whether this is partly due to the economic climate requires further investigation. Indeed, this could be due to the low expectations of HR by line managers. Commitment is not altered as the initial expectation was that HR would not deliver supporting activities a common finding within the research from repatriates and line managers alike. Nonetheless, widening the sample to include other organisations as well as other industry sectors would provide further opportunities to evidence the role of multiple stakeholders within the process.

Chapter 7: Contribution to practice

7. Contribution to practice- implications and recommendations

It seems incongruent that so much emphasis is placed upon career progression within the policy when this is singularly the most unsatisfactory experience for the repatriates (Lazarova & Caliguri, 2001; Sanchez Vidal et al, 2008). Valuing the experience, knowledge and skills gained during an international experience has long been noted as fundamental basic requirement in order to facilitate an effective repatriation process (Baruch et al, 2002; Hyder & Iovblad, 2007; Lazarova & Cerdin, 2007; Stroh et al, 2000).

The policy highlights that in the unlikely event that no role is identified the assignee may be at risk of redundancy, but for the majority of repatriates there was no role until the line manager, either current host or previous home intervened. The relationship of the stakeholders within the practice is highlighted from this research and ownership and consistency are crucial themes (Lazarova & Cerdin, 2007). In order to benefit from the findings practical implications are noted within the recommendations section addressed in this chapter.

7.1 Implications for practice - Recommendations

This section is the culmination of critical evaluation of the current repatriation process. It aims to provide practical recommendations that HR practitioners can implement to improve the process for not only the repatriates but additionally for other organisational stakeholders such as line managers (Jasswalla, Connolly & Slojowski, 2004; MacDonald & Arthur, 2005; Paik, Segaud & Malinowski, 2002).

Clear guidance is required for the roles and responsibilities related to the repatriation process. The guidance alone is not enough to make the difference, what is required is an education programme to re-enforce the improvements that can be made. Ownership forms the central tenet for recommendations to improve the repatriation experience. Each point outlined below also signifies an abbreviation of the most pertinent stakeholder/s (e.g. *IHR*, *HR*) who in the first instance should take responsibility for the action related to the recommendation.

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7.2 Policy – IHR, HR

The policy suffers from some misunderstanding between users (Boselie & Boon, 2005; Lazarova & Cerdin, 2007; Nishi, 2008; Sparrow, 2007). Equally the issue of extension and repatriation requires further clarity as the policy conciseness could encourage misinterpretation. There should be more guidance in terms of whether the assignment is necessary in the first place, can the position be filled locally for example. Furthermore, consideration regarding whether the right individual is selected for the assignment should be explored described above as fitness for assignment. The best candidate in terms of technical expertise may not be the most flexible and ultimately not the best fit.

In addition cost scenarios should be available for the most common salary combinations including single, accompanied and accompanied with dependents. Costing is important for the business to understand the expense involved. Timely cost projections require estimates within 24 hours. The average time line of 5 days within this study for a cost projection is too long. Thus some line managers will make the decision to expatriate an employee without a good understanding of the costs involved.

IHR to provide assistance to enable line and HRBPs to make informed decisions utilising IT to provide exemplar cost projections stored via the intranet. Easy access to information related to international assignments enhances the decision making of HRBPs and line managers. All information regarding the process should be owned by IHR with a helpline to answer queries electronically providing instant access and a helpline number to resolve queries this would facilitate a clear line of responsibility. Consistent advice is required, but some queries may be recurring therefore an Intranet site with common questions for line/ HRBPS and repatriates should be easy to find and provide a quick answer.

Provide clear guidance for redundancy on assignment and at the time of repatriation. There have been a lot of redundancies in the past and it is likely in the future. The policy could reflect any flexibility as this is a major cause of anxiety.

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Recommendation: Provide an accessible intranet expatriate site to answer basic queries including exemplar cost projections. Help line numbers should be available on line to talk through queries for the host, home line manager and HRBPs as well as the repatriate should the answers not be readily available.

Recommendation: IHR to provide policy briefing to HRBP and line managers in order to outline the costs involved with expatriation.

7.3 One point of contact – repatriates

Currently there is a bit of everybody involved within the process IHR, HRBPs and LM, there needs to be far more clarification and consistency of when and how decisions could be made (Francis & Keegan, 2006; Hailey et al, 2005). The first step in the process is generated by IHR to provide a list of all expatriates and their due return date. The issue of what happens to the data and who receives it is a fundamental stalling point. Once confirmation of an assignment is due to end sent via the IHR report, HR home/host and the line home/host are left to review and decide whether an extension is required and whether this is feasible. However, if the IHR function has greater engagement with the line they could be adding value by offering advice regarding extending or localising to ensure that consideration of tax, NI and immigration status are all reviewed in order to ensure the best outcome for all. Without due consideration of the tax implication of an extension, all be it for a matter of months, there could be unnecessary tax liabilities for the organisation and potentially frustration for the repatriate. The repatriate is also involved in discussions with their current line and potentially home line manager; however, the decision is and should be driven by the business need. Whilst the HRBPs do in some cases undertake the role of facilitator during this stage the recommendation is that IHR should undertake the facilitator role in order to ensure a decision has been reached to allow sufficient time to undertake the necessary repatriation tasks. Thus consistency to the process would be achieved to overcome the reality of regular changes to HRBPs during the expatriation and final repatriation (Lazarova & Cerdin, 2007). Additionally rather than each of the line manager's vested interest for their business is the IHR function can take an impartial view.

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Recommendation 1: IHR to act as facilitator during the repatriation discussions and become the main point of contact for the repatriate.

7.4 Setting expectations – Repatriate, HRBPS and Line manager

The initial issue is to address setting expectations and lines of communications that are consistent from the beginning of an assignment (Allen & Alavrez, 1998; Coyle-Shapiro & Kessler, 2002; Paik et al, 2002; Stevens et al, 2006; Suutari & Brewster, 2003). The employee will not consider repatriation during the initial stages on an assignment. However, setting expectations to clarify that the return is likely to be as demanding as the initial expatriation should be reiterated (Stroh et al, 2000). The expatriate is equally responsible to ensure they are the best fit for an assignment in the first place and to make themselves aware of the aspects of an expatriation. For example, personal finance, implications for partner career, continuing education for children etc.

Recommendation: IHR to provide pre departure briefing to clarify roles and responsibilities including repatriation tasks from the outset.

Recommendation: IHR to provide confirmation of performance on assignment in order to update and review the repatriate's competencies to aid identification of a return position.

7.5 Career prospective

Many of the repatriates were left feeling that their experience had gone unnoticed as too were the newly acquired skills and knowledge they have gained (Lazarova & Caliguri, 2001; Sanchez Vidal et al, 2008). Whilst expatriates are appraised during their assignment there appears to be a disconnect with the information between home and host HRBPs. This does not negate responsibility for the repatriate to ensure they manage their own career, but does provide opportunities to ensure the organisation is utilising the knowledge and skills gained.

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Ensuring that the expatriates form part of global talent pool requires thought as to how repatriates are matched to possible future vacancies. There is no ownership of the return position and ultimately the repatriate drives identifying a position. However, this process could be enhanced dramatically if the skills of the repatriate and positions available were matched in a consistent manner through collation of appraisals on assignment and debrief information prior to return. This reinforces the view that a central point to manage the information regarding the repatriate's skill and knowledge is required whilst incorporating responsibility of the home HRBPS to manage the talent pool.

Recommendation: IHR to take ownership to receive and maintain the appraisal information to ensure the data is passed to the new home manager.

7.6 Formalised Debrief – Repatriate, IHR

A debrief fulfils several important functions (Black & Gregersen, 2007). Firstly, a formalised debrief provides an opportunity for the repatriate to confirm the expatriate experience. Secondly it provides the opportunity to audit their newly acquired skills. Thirdly, a debrief provides opportunity to improve the repatriation process in the future. Fourthly, this provides the opportunity to engage with the repatriate to acknowledge the experience and demonstrate the assignment is valued.

Recommendation: IHR to provide pre repatriation debrief.

Recommendation: IHR to provide debrief upon repatriation.

Recommendation: IHR to liaise with HRBP prior and after repatriation regarding updated skills and experience to feed into Talent pool.

7.7 Tax support - Repatriate

Tax provision is provided by a third party. The experience of all of the repatriates leads to the conclusion that a full review of current tax provision is urgently required. There are several outstanding tax liabilities currently accrued due to the assignment. Thus repatriates are faced with large payouts up to 2 years after repatriating. There is scope

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to provide more tax planning equalisation to enhance the current provision. Tax planning with IHR discussion with line and HRBP regarding the repatriation date can save thousands. Misunderstandings with home payroll also require review and therefore ownership within the organisation equally requires review.

Recommendation: to urgently review the scope of contract of the tax advice provider

Recommendation: to determine communication links with payroll and tax advice provider.

7.8 Timing IHR

Extending an assignment has to balance need of the repatriate and that of the business. However, a timely decision has to be made (Suutari & Valimaa, 2002) in order to activate repatriate activities which could include accommodation notice on rental property and to tenants at home, as well as continuity of education.

Recommendation: IHR to proactively manage updates to monthly expatriate data for line managers use.

7.9 Cost base HRBPs/ IHR

A review of whose paying for the assignment is required, shared ownership from the home and host location, where feasible, provides shared responsibility for the expatriate. Some HRBPs note that they were using more and more hybrid assignments as a way to work around the current policy thus misusing expat packages by sending people out on local deals. The outcome is that the hybrid assignee is not monitored but when they return there will be repercussions for tax, pension etc. The process upon revision must be accompanied by greater direction as to who owns what. IHR as owners of the process need to provide greater communication with the line and HRBPs a quarterly follow up on expat/repatriate.

Recommendation: HRBPs to engage with IHR regarding Hybrid assignments to ensure they are monitored.

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Recommendation: IHR to provide quarterly follow up on expatriate/repatriate.

7.10 Retention IHR/ HRBPs

Expatriates sometimes leave whilst on assignment (Bonache, Brewster, Suutari & De Saa, 2009; Hyder & Lovblad, 2007). Or during the repatriation process, furthermore some repatriates leave within the first 12 months of repatriating. The information for each of these scenarios is not captured in any consistent or concerted way. The HRBP be it host or home at the time would hold the information, but the data does not feedback to IHR who could collate the information.

Recommendation: HRBPs to monitor retention during and up to 2 years after the assignment. HRBPs to interact with IHR to ensure the information is collated if an assignment ends prematurely.

7.11 Interface between IHR/HRBPS

Greater visibility for the IHR function and the work they undertake is required to raise their profile within the organisation with Line and HRBPS (Hailey et al, 2005; Kinnie et al 2005). Provide secondment opportunities as an exchange with HR. Provide opportunities for an education program regarding expatriate policies and the services they provide.

Recommendation: IHR to raise profile internally. Organise an event for HRBPs to meet IHR and present IHR's services. Re launch IHR services as the one stop shop for international staff.

7.12 Home Line manager

The home line manager should be encouraged to consider that the repatriate if new to his/her department will not necessarily slot back into the organisation. The line manager is influential in maintain the employees attitude towards the organisation (Schyns et al, 2007). Practical considerations such as IT access, log ons, phones, desks etc. are not always thought about until the repatriate has started their new position.

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Recommendation: Line manager to treat a repatriate as a new joiner and facilitate appropriate actions along with HRBP.

7.13 Evaluate success of assignment

How to determine whether an assignment has been a success appears to be precluded from the current process (Kraimer & Wayne, 2004; Stevens et al, 2007; Tung, 1987). The findings have highlighted the multifaceted nature of success. Moreover terms for success are not explicating stated from any stakeholders' perspective. If it is a short term assignment and it was a task orientated assignment then it is completion of those tasks. For a long term assignment success could be measured terms of the setting up a new business, setting up the new business and training of the new staff.

Recommendation: IHR to evaluate success of the assignment in conjunction with host line manager. Feedback of the outcome of the assignment should be provided to HRBPs and line managers to make ongoing improvements to the repatriation process and experience.

7.14 Limitations

As with any empirical research there are limitations to this research. One of the major limitations for the study was the small sample size. The sample is drawn from current employees with the organisation and therefore their views could be exposed to potential bias. Although attempts were made to identify ex-employees the organisation were unable to provide any names or contact details. This is in part due to the fact that currently monitoring retention does not form part of any process within the international life cycle nor does capturing the data during an exit interview for those individuals who have undertaken an international assignment. Extending the study to incorporate a larger sample across industry sectors would also be beneficial. The sample size of 15 is small, however, with only 1 – 2 repatriate's returning each month the potential pool of respondents was low. The IHR manager was the only person interviewed to represent IHR within the organisation as there is only one IHR manager representing the EMEA

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US region. The inclusion of HRBPs and line managers was limited due to time constraints availability.

Undoubtedly the major economic crisis experienced across the globe during the past three years made it difficult to extend the study to further financial institutions. In addition the study would have benefitted from undertaking a longitudinal study. However, time and cost constraints prevented this approach.

Chapter 8: Professional development

8. Professional development

This chapter seeks to demonstrate the author's continued commitment towards continuing professional development (CPD) highlighting the opportunities experienced during the process of doctoral study. Culminating in the final thesis document presented. This is a unique view from the author's perspective that has required continual reflection over the period of study that has developed the way the author thinks and acts during the course of academic and personal life experiences.

8.1 DBA Vs PhD

DBA's provide the opportunity to seek resolution of a practical issue. The area of intended research surrounds the many practical issues repatriates face from an individual and organisational perspective. More specifically the issue of repatriation has fascinated me since my own experiences as an expatriate. I believed from the beginning that this is a workable project with practical application as well as advancement of academic knowledge.

Lunt professes that there are three different professional doctorates including the DBA (ESRC Project R223643/2001). With regard to the effect on practice, it was reported that this influence varied because of the wide ranging profile of DBA candidates. This is clearly highlighted from the 2006 DBA cohort with interests ranging from; trust in mergers; corporate social responsibility; Islamic banking; risk management and repatriation. In addition there is a diverse demographic incorporating ages from 30's to 50's. Disappointingly the cohort is male dominated although ethnically diverse. Thus the cohort in terms of experience, knowledge and cultural experiences enhances the learning process.

As the course has progressed so too has the bonds between the group. This is clearly illustrated in the work undertaken to develop a bid for the ESCRC. Communication between the cohort has remained important and whilst there are limited opportunities to meet since formal teaching has ceased we have remained in contact to support one another.

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During summer 2008 some of the cohort attended the Academy of Management conference in Anaheim this was funded by my Head of Department. This proved highly beneficial in terms of literature and methodology attending PDW sessions regarding international HRM and qualitative research as well as having the opportunity to present a PDW.

8.1.1 Identification of learning needs and the learning contract

Barron (2002) posits that the majority of students are attracted to courses that suit their learning styles. I concur that this was main reason to pursue a DBA rather than a PhD. The course delivery was one weekend a month; this precluded any issues with time off from employment. Understanding one's own specific learning needs requires a deep level of self reflection. Such reflection has lead to identifying development opportunities to bridge any gaps.

Self development is often labelled as a journey requiring clarity about the purpose and values (Megginson & Whitaker, 2007). Understanding why you are doing something, helps to deal with the stresses and pressures we face along the way. However, on reflection it must be said that undertaking a DBA whilst starting a new career as well as a teaching qualification and two children under 5 seems quite ridiculous!

Balancing all the requirements of study, work and importantly home life has been the main challenge. Forming coping strategies to deal with stressful situations does help as well as setting deadlines for manageable pieces of work to be delivered along with an incentive (refer to action plan below) has kept the momentum to complete the requirement of the course.

8.1.2 Feedback during taught sessions (First phase)

One of my peers on the course provided some valuable feedback during a session regarding my concerns that I was beginning to lose myself within the course. The thoughts centred around confirming how I view situations and concentrate on the overall picture. My main focus was the research focus and what my final research would look

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like and how to achieve this. No time had been set aside to figure out the detail which was achieving the assignments. Once this crystallised I was able to focus on the ARTS assignments rather than the final thesis. This has helped enormously in other ways as I now think twice about explaining the overall picture and understanding that some people prefer a lot more detail. This has progressed work relationships as I find it much easier to interact with people with the same ‘big chunk’ thinking style and then need to address my approach accordingly should the person not follow the same style of thinking – in most cases this has been surprisingly successful.

Undertaking a presentation to the DBA cohort provided an opportunity to analyse the some of the approaches I had used previously in consulting. I undertook a session in processing mapping (see appendices) and wondered whether this would be useful. I was amazed and how much one colleague took from the session, peer review is incredibly powerful.

At the end of the course we presented on one aspect of our learning during the previous 11 months. I decided to present my reflections for the ARTS element of the course as this has been the greatest challenge so far. I actually enjoyed the presentation spurred on by the fact that I had the support from the cohort. I felt I could really convey what I had learnt and that it would benefit my peers and the feedback from colleagues highlighted the points they had taken away from the presentation which was very satisfying.

8.2 Reflection on learning from ARTS assignment

In order to reflect upon the learning from the Advanced Research Methods course I have mapped the learning achieved against the learning outcomes. Attending the lectures for ARTS in November 2006 began the thought process of how to refine a research proposal. Together with a colleague from Marketing we put together a research proposal to gain colleagues’ feedback. This made me realise how ill prepared I was to undertake a research project – comments entered in my reflective diary confirm that after presenting the initial idea that colleagues thought it too ambitious, not well thought

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through and lacking a clear instrument for research. I must confess at the time I didn't fully understand all of the comments and it has taken a further six months to appreciate the advice and what is required to put together a decent research proposal.

Reflecting upon why we choose methods from the outset the course lecturer wanted us to place ourselves on a line of whether we are more interpretivist or positivist in our preference for research. All those with an HR interest were firmly interpretivist whilst those more orientated to numbers were positivist. Thinking through my preferences, I have always preferred to discuss people's thoughts opinions and motivations and it seems natural that I would want to approach my research in the same way. For example, a lecturer provided a very enlightening presentation regarding her own research using visual research methods; she believed this was grounded in her experience as a child. Her father worked as a photographer which had a profound impact upon her own learning preferences, linking back to the previous section with regard to Kolb and Fry regarding childhood experiences this would concur with their research.

8.3 Public Dissemination

Although this module created some concerns initially regarding the validity of the assessment criteria there were real benefits which mapped the learning outcomes.

In addition, I worked with a colleague and wrote a conceptual paper on self-initiated expatriates and the considerations for HR. This provided an opportunity to work with an experienced colleague putting together a paper. With a four-week deadline, in March, this did affect other work commitments. However, the resulting learning was a great experience refining literature reviews searches, writing up and acquiring greater skills for research. Ultimately the paper was accepted to the International Journal of Human Resource Management: **Howe-Walsh, L. & Schyns, B. (2010). Self-initiated expatriation: Implications for HRM. International Journal of Human Resources Management (see appendices section 9).**

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In addition, I have published an article with a student as well as contributed to book chapters and practitioner periodicals listed below:

Rayner, C. & **Howe-Walsh, L.** (2010) 'HRM Contributions in different settings' in French, R. and Rees, G. (eds) *Leading, Managing and Developing People*. CIPD.

Howe-Walsh (2010) *Self-Initiated expatriates*. HR Bulletin - Research and Practice CIPD.

Williams, S., Scott, P., **Howe-Walsh, L.** and Brown, E. (2009) 'International human resource management', in Gilmore, S, and Williams, S. (eds.), *Human Resource Management*, Oxford: Oxford University Press.

Fitzgerald, C. & **Howe-Walsh, L.** (2008) *Self-initiated expatriates: An interpretative Phenomenological; analysis of professional female expatriates*. *International Journal of Business and Management*.

Rees, G., Rayner, C. and **Howe-Walsh, L.** (2008) "What is hot in HR - reflections from an HR conference in Anaheim, California", *HR Bulletin - Research and Practice CIPD*.

Howe-Walsh, L. (2007) *International HR*. HR Bulletin - Research and Practice CIPD.

Wilson, F. & **Howe-Walsh, L.** (2007) *International Talent Management* HR Bulletin - Research and Practice CIPD.

I have presented at several conferences in order to disseminate my research during the last four years discussed in the following section.

8.3.1 Presentation

The basic premise was to provide a polished presentation on an area of interest. During the practice presentations, I moved away from traditional power point and presented a

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diagram drawn on the board. The presentation went well and lots of positive feedback was made apart from my lack of involving humour within the presentation. For the final assessed presentation, I went back to my tried and tested formula and presented with power point. Again the result was good, but I went over time by 2 minutes for which I received criticism. From this I learnt that practicing timing is still as crucial today as it was as an undergraduate and due to the change of delivery day I was not as well as prepared as I could have been. The key learning is practice the timing.

Since this initial learning I have presented at the following conferences:

European Academy of Management (2010) Repatriation: implications for HR policy and practice (Peer reviewed paper).

Portsmouth Business School (2010) Repatriation issues for HR.

Academy of Management (2008). Leadership and HR.

Portsmouth Business School (2008) Self Initiated expatriates.

8.3.2 Final draft of chapter for publication

For this assignment I undertook to write a contribution to a new HR text specifically International HRM. In contrast to the journal article the book chapter is far more informal. This experience has generated a great confidence in my own knowledge of the subject and ability to work with colleagues and develop my academic writing.

8.3.3 Review of refereed journal article

I submitted an article with a colleague and was then requested by the publisher to undertake a blind review. This provided a huge challenge as the paper was written from a positivist preference using statistical analysis. The task seemed overwhelming initially and beyond me, but I read the article through and although it took a couple of reads, the basic concepts were understandable. My review centred on the sample size and the level of analysis that had been undertaken on what was a sample of 44. I provided some comments and asked an experienced statistical colleague to review. To my amazement my colleagues' comments were similar to mine and I felt confident to provide the

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feedback to the publisher. I learnt that I had gained a lot more than I realised from the statistical assignment which is very positive.

8.4 ESRC final application for grant funding

A team from the DBA programme along with Professor Ashraf Labib undertook the preparation of the bid and writing the proposal. This required several of the cohort working on the bid in our own time and meeting outside of work to progress the application. The real benefit other than the experience of working a proposal was the team work. Thus my personal development propelled exponentially from this opportunistic development.

8.5 Map of professional practice

In accordance with membership of the CIPD I have maintained my professional development in order maintain my licence to upgrade students to graduate membership.

8.6 Plan for study with updated results for phase 1

Action points	Timescale	Urgency	Result	Reward
WEB CT	7 th January	Moderate	Pass	
Arts formative presentation	11 th January	Moderate	Formative	
Arts first assignment	31 st May	Very	Pass	Holiday
Arts second assignment	31 st May	Very	Pass	Holiday
Arts third assignment	31 st May	Very	Fail	Lost confidence
PD presentation	31 st August	Moderate	Pass	
PD review of article	31 st August	Moderate	Not known	Confidence
PD publishable article	31 st August	Moderate	Not known	Dinner
PRD presentation	8 th September	Moderate	Pass	Weekend Off
PRD portfolio	30 th September	Very	Not known	Weekend Off
Research Proposal	Mid November	Moderate	Not known	Shopping trip

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Unplanned learning opportunities

Action points	Timescale	Urgency	Result	Reward
Article for journal submission	March	Very	Accepted International Journal of HRM Feb 2010	Research opportunities
Bulletin article for CIPD local publication	June	Moderate	Published	Confidence
ESRC Research bid	30 th June	Very	Declined	Confidence to make another bid
ESRC presentation – PBS research conference	4 th July	Very	Successful presentation	Money in purse account
Chapter for HRM text	September	Moderate	Formative	Payment

8.7 Research proposal and plan for study for Phase 2

Action points	Timescale	Urgency	Result	Reward
Research Proposal	Mid November, 2007	Moderate	Not known	Christmas break - skiing
Literature review	January 2008	Urgent	Not known	Pamper day
Research methods	April 2008	Urgent	Not known	Shopping
Confirmed sample	June 2008	Urgent	Not known	Weekend off
Attend CIPD conference	June 2008	Moderate	Discussion with International rep – local branch article written	Local publication
Attend AOM conference	August 2008	Moderate	Networking	
Interviews et al	3 months, September 2008	Moderate	Not known	Holiday
Analysis of data	6 months March 2008	Moderate	Not known	Weekend off
Write up	6 months September 2008	Moderate	Not known	Holiday
Preparation for Viva	June 2009	Moderate	Not known	

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8.8 Updated Research plan for study for Phase 2

Action points	Timescale	Urgency	Result	Reward
Research Proposal	Mid November, 2007	Moderate	Pass	Christmas break - skiing
Literature review	January 2008	Urgent	Complete	Pamper day
Research methods	April 2008	Urgent	Complete	Shopping
Confirmed sample	June 2008	Urgent	Complete	Weekend off
Attend CIPD conference	June 2008	Moderate	Did not attend	
Attend AOM conference	August 2008 and 2009	Moderate	Further literature gained	
Interviews et al	12 months, September 2009	Moderate	Took 9 months longer than expected	Holiday
Analysis of data	4 months	Moderate	Within time	Weekend off
Write up	6 months to November 2009	Moderate	Review and edit until final over time	Holiday
Preparation for Viva	Attended course April 2009	Moderate	Presenting findings PBS conference and EURAM	Pass Viva
Prepare paper for EURAM Jan 2010	Dec 09 – Jan 10	Urgent	Paper accepted	Attend and present paper May 2010
Chapter HRM text	Jan 10-Mar 2010	Moderate	Published Sept 2010	Payment

8.9 Conclusions

This portfolio represents my commitment towards continuing professional development. As well as highlighting the various activities undertaken throughout the year it has provided the opportunity to be more aware of the planning and management required to develop my learning needs for the future. In addition, I have been able to reflect and analyze the previous learning I have acquired and where this is relevant for my ongoing development utilising tools such as SWOT and a diagnostic metric.

As part of this course, I have undertaken several assignments and reflected on how these elements influence my professional practice. In addition, there have been several opportunities to develop my presentation skills such as EURAM. I have engaged in debate with the DBA cohort and lecturers who have questioned areas such as sample

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size, to use of humour in presentations. This has influenced my plan of action going forward and how I have worked towards my goal of achieving the DBA and future career planning. I have worked as a Course Manager for the CIPD programmes and undertaken more research. My interest in research has developed further due to continual reflection upon my writing. In turn, this has helped to frame my future plans to enhance my academic research in conjunction with practical application. Thus my future plans involve working with practitioners' to enhance the international assignment experience for all stakeholders. I have started this process and will be working in Canada later this year to drive a project to implement HR policy and practice changes. In addition I will have two papers in process, one for academic dissemination and the other for practitioner use.

Undoubtedly the major benefit of DBA programme is the opportunity to develop academic writing skills (see appendix 9, IHRM Journal article as an example), in conjunction with the opportunity to contribute to improve HR practices.

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Appendices

9. Appendices

1	University Ethical guidelines
2	Letter of Invitation – Interview
3	Consent form
4	Participant information sheet
5	Interview Questions
6	Example emails
Table 1	Demographic information repatriate sample
Table 2	Demographic information of HR and Line Managers
Table 3	Themes from interviews
Table 4	Integration of Cases
7	Howe-Walsh Journal article

1. Ethical Review Checklist – Staff and PhD researchers

This checklist should be completed by the researcher (PhD students to have DoS check) and sent to Sharman Rogers who will coordinate Ethics Committee scrutiny.

No primary data collection can be undertaken before the supervisor and/or Ethics Committee has given approval.

If, following review of this checklist, amendments to the proposals are agreed to be necessary, the researcher must provide Sharman with an amended version for scrutiny.

1. What are the objectives of the research project?

To explore the current practices adopted to manage the repatriation process.

Understand the nature of support offered by the HR business partners, hand overs between home, and host HR.

To develop an understanding of why expatriates leave the organisation before completion of the assignment and within 12 months of return.

2. Does the research involve *NHS patients, resources or staff*? NO (please circle).

If YES, it is likely that full ethical review must be obtained from the NHS process before the research can start.

3. Do you intend to collect *primary data* from human subjects or data that are identifiable with individuals? (This includes, for example, questionnaires and interviews.) YES / (please circle)

If you do not intend to collect such primary data then please go to question 14.

If you do intend to collect such primary data then please respond to ALL the questions 4 through 13. If you feel a question does not apply then please respond with n/a (for not applicable).

4. What is the *purpose* of the primary data in the dissertation / research project?

To investigate the process of repatriation.

5. What is/are the *survey population(s)*?

International assignees within organisation.

6. How big is the *sample* for each of the survey populations and how was this sample arrived at?

12 at each stage total 36 people – timing of their repatriation determines the exact figure.

7. How will respondents be *selected and recruited*?

Convenience sample will be adopted with the assistance of the organisation.

8. What steps are proposed to ensure that the requirements of *informed consent* will be met for those taking part in the research? If an Information Sheet for participants is to be used, please attach it to this form. If not, please explain how you will be able to demonstrate that informed consent has been gained from participants.

Participants will be advised about the purpose of the research and informed why they are being invited to participate. Permission to record the interview will be requested.

9. How will *data* be *collected* from each of the sample groups?

Semi structured telephone interviews – follow up questionnaire may be necessary.

10. How will *data* be *stored* and what will happen to the data at the end of the research?

The data will be held securely by the University and only the research team will have access to the data. The data will be held by the University for a period of 4 years after the DBA examining board have awarded the doctorate and then they will be disposed of securely.

11. How will *confidentiality* be assured for respondents?

Respondents' data will be treated as confidential and analysed collectively.

12. What steps are proposed to safeguard the *anonymity* of the respondents?

Participation in the study will remain confidential and access to the data will be restricted to the research team. Data will be analysed collectively.

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13. Are there any *risks* (physical or other, including reputational) *to respondents* that may result from taking part in this research? YES / NO (please circle).

If YES, please specify and state what measures are proposed to deal with these risks.

NO

14. Will any *data* be *obtained from a company or other organisation*. YES / (please circle) For example, information provided by an employer or its employees.

If NO, then please go to question 18.

Yes. The data will be collected from individuals and the researcher will outline the reason for the research and will ensure that the data is handled confidentially.

15. What steps are proposed to ensure that the requirements of *informed consent* will be met for that organisation? How will *confidentiality* be assured for the organisation?

Reasearcher will brief respondent allowing the opportunity to withdraw from interview at any stage of the process

16. Does the organisation have its own ethics procedure relating to the research you intend to carry out? YES / NO (please circle).

If YES, the University will require written evidence from the organisation that they have approved the research.

No. The Head of International assignments has approved the research during a meeting held at Organisation offices in London on the 29th of November.

17. Will the proposed research involve any of the following (please put a \checkmark next to 'yes' or 'no'; consult your supervisor if you are unsure):

- | | | | | |
|---|-----|--------------------------|----|-------------------------------------|
| • Vulnerable groups (e.g. children) ? | YES | <input type="checkbox"/> | NO | <input checked="" type="checkbox"/> |
| • Particularly sensitive topics ? | YES | <input type="checkbox"/> | NO | <input checked="" type="checkbox"/> |
| • Access to respondents via 'gatekeepers' ? | YES | <input type="checkbox"/> | NO | <input checked="" type="checkbox"/> |
| • Use of deception ? | YES | <input type="checkbox"/> | NO | <input checked="" type="checkbox"/> |
| • Access to confidential personal data ? | YES | <input type="checkbox"/> | NO | <input checked="" type="checkbox"/> |
| • Psychological stress, anxiety etc ? | YES | <input type="checkbox"/> | NO | <input checked="" type="checkbox"/> |
| • Intrusive interventions ? | YES | <input type="checkbox"/> | NO | <input checked="" type="checkbox"/> |

18. Are there any other ethical issues that may arise from the proposed research?

NO

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Details of applicant

The member of staff undertaking the research should sign and date the application, and submit it directly to the Ethics Committee. However, where the researcher is a supervised PhD candidate, the signature of the Director of Studies is also required prior to this form being submitted.

	Name	Signature
Researcher	Liza Howe-Walsh	
Director of Studies	Ashraf Labib	
Date	20/11/07	

Approval by Ethics Committee

I/We grant Ethical Approval

FREC

Date

AMENDMENTS

If you need to make changes please ensure you have permission before the primary data collection. If there are major changes, fill in a new form if that will make it easier for everyone. If there are minor changes then fill in the amendments (next page) and get them signed before the primary data collection begins.



Portsmouth Business School
University of Portsmouth
Richmond building
Portland Street
Portsmouth PO1 3DE

LETTER OF INVITATION – Interview

Dear

I am writing to you to ask for your help in a research project which I am undertaking in order to fulfil my Doctorate in Business Administration study at The University of Portsmouth. The topic of research focuses upon the issues surrounding repatriation of International assignees. The research area is very up to date and interesting because there is limited research in this field. It is hoped that the findings of the research will benefit both organisations and individuals in their repatriation process in the future. By completing the interview you can contribute to the research.

You have been chosen since you are a professional working in or on an international assignment. The interview will take around 30 minutes to complete and is made up of the following:

1. Some demographic information about yourself and your position in the organisation.
2. The policies and practices surrounding International assignments with specific reference to the repatriation process.

I have also attached an Information Sheet and a Consent Form. These provide you with all the essential information about the research and provide assurances that the research complies with the University of Portsmouth ethical guidelines.

I feel it is important to emphasise that the data will be handled confidentially and with care. The results of the research will be published in anonymous form in scientific journals, conference papers and industry publications.

Thank you in advance for your help with this research project. Your assistance is very much appreciated. I would be very happy to share the research findings with you, once completed and I am enclosing a separate request card for you to fill out and return should you be interested in receiving a copy.

Please feel free to contact me if you have any questions or problems.

Yours sincerely,
Liza Howe-Walsh
Tel: +44 (0)23 9284 4051
e-mail: liza.howe-walsh@port.ac.uk

CONSENT FORM - Interview

Title of project: The road to repatriation

Name of Researcher: Liza Howe-Walsh (Tel: +44 (0)23 9284 4051)

Contact Address: Department of HRMM
University of Portsmouth
Richmond Building
Portland Street
Portsmouth PO1 3DE

		Please Initial Box
1	I confirm that I have been informed of the nature of the research and have the opportunity to ask questions	
2	I understand that my participation is voluntary and that I am free to withdraw at any time, without giving reason.	
3	I agree to take part in the above study.	

Name of Participant:

Date:

Signature:

Name of Researcher:

Date:

Signature:

PARTICIPANT INFORMATION SHEET – Interview

Title of project: The road to repatriation

Name of Researcher: Liza Howe-Walsh (Tel: +44 (0)23 9284 4051)

Contact Address: Department of HRMM
University of Portsmouth
Richmond Building
Portland Street
Portsmouth PO1 3DE

You are being invited to take part in a research study. Before you decide whether to participate, it is important that you understand why the research is taking place and what it will involve. Please take time to read the following information carefully.

Purpose of the study

This research takes place in the frame of the fulfilment of the requirements of a Doctorate in Business Administration at The University of Portsmouth and is being solely funded by The University of Portsmouth. The topic of the research is repatriation issues affecting international assignees.

Why have I been chosen?

You have been selected to participate in the study because you are or have been involved with international assignments. The study will contact several employees and ex employees in the organisation to participate in the study.

Do I have to take part?

No. Participation in the research is entirely voluntary, and only those individuals who provide their informed consent will be included in the study. Your decision to

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participate or not will not disadvantage you in any way. If you do decide to participate, you may withdraw at any time without giving a reason.

What are the possible benefits of taking part?

The research hopes to contribute to existing knowledge in the field of repatriation processes and hence will be of value to both academics and practitioners in this area.

If I do participate, what do I have to do?

If you do decide to participate, you will be asked to complete an interview which should take approximately 30 - 45 minutes.

Will my details and answers remain confidential?

Yes. Interviews will be used to collect the data and these are anonymous. All the information about your participation in this study will remain confidential.

The transcripts from the interviews will be held securely by Portsmouth University and only the research team will have access to the questionnaire. Data will be held by The University of Portsmouth for a period of 4 years after the DBA examining board have awarded the degree and it will then be disposed of securely.

The results of the research will be published in anonymous form in scientific journals, conference papers and industry publications.

Please feel free to ask Liza (contact details given above) any questions you may have about the research. Attached is a consent form. Please read and sign if you are happy to participate in the research.

THANK YOU

This research has been approved by The University of Portsmouth Research Ethics Committee. The University of Portsmouth Ethics Policy is available to view at <http://www.port.ac.uk/departments/faculties/portsmouthbusinessschool/research/pbsethics/filetodownload,93117,en.pdf>

If you have any concerns regarding the above study, please contact The Complaints Officer, Samantha Hill, University of Portsmouth (Tel: +44 (23) 9284 8484)

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Appendix 5. Repatriation: individuals' view of practices

Age:

Gender:

Education:

Tenure:

Length of assignment:

Time back after latest assignment:

Previous assignments:

When was the repatriation discussed (was it timely?) and with whom – home/host line mgr, HR home/host, IHR?

What support activities were provided to you, your partner/children and by who – home/host line mgr IHR, HR home/host?

What support did you; your partner/children receive before the repatriation?

What support did you; your partner/children receive after the repatriation?

Who were the main contacts for support in each scenario e.g. line Mgr HR home/host IHR?

Did the repatriation policy influence your decision to undertake an assignment?

What does commitment towards the expatriation mean to you?

What does commitment towards the repatriation mean to you?

How many times did you return to your (home) work location during the assignment?
During these visits did you discuss your repatriation with anyone and who?

How was another role identified upon repatriation and who was involved Home/host line mgr, HR?

What, if any, improvements would you recommend to improve the repatriation process?

Have you anything to add that we did not discuss, but is important to you for expatriation and repatriation?

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Appendix.6. Introductory Email examples

Repatriate

I am contacting you with regard to a research initiative we are supporting with the University of Portsmouth into the repatriation process. As a recent repatriate we value your opinion and would like to recommend your participation in the study to discuss your experiences. The interviews will be conducted independently by Liza Howe-Walsh, a researcher from the University; all feedback will remain confidential and anonymous. If you were accompanied on assignment by your partner and family their participation would also be highly valued.

It is anticipated that interviews will last no longer than 30 minutes and will be conducted either face to face or via telephone. Interviews will be arranged as soon as possible. The feedback from the interviews will be used to assess the overall success of the current repatriation process and make potential recommendations for future repatriation processes and programmes.

The next step is to agree to participate at which point your contact details will be passed to Liza to arrange a mutually convenient time to talk. Participation is entirely voluntary and you may withdraw at any stage of the research.

If you would like any further details regarding the research please feel free to contact myself or Liza directly.

Your participation will be greatly appreciated and will assist our continuous improvement of International HR services.

Liza.howe-walsh@port.ac.uk
<http://www.port.ac.uk/departments/academic/hrmm/staff/title,38172,en.html>
Telephone: +44 2392 844051

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Appendix 6. HRBP email

I am contacting you with regard to a research initiative we are supporting with the University of Portsmouth into the repatriation process. As an HR Business Partner to an expatriate we value your opinion and would like to recommend your participation in the study to discuss your experiences. The interviews will be conducted independently by Liza Howe-Walsh, a researcher from the University; all feedback will remain confidential and anonymous.

It is anticipated that interviews will last no longer than 30 minutes and will be conducted either face to face or via telephone. Interviews will be arranged as soon as possible. The feedback from the interviews will be used to assess the overall success of the current repatriation process and make potential recommendations for future repatriation processes and programmes.

The next step is to agree to participate at which point your contact details will be passed to Liza to arrange a mutually convenient time to talk. Participation is entirely voluntary and you may withdraw at any stage of the research.

If you would like any further details regarding the research please feel free to contact myself or Liza directly.

Your participation will be greatly appreciated and will assist our continuous improvement of International HR services.

Liza.howe-walsh@port.ac.uk
<http://www.port.ac.uk/departments/academic/hrmm/staff/title,38172,en.html>

Telephone: +44 2392 844051

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Appendix 6. Line email

I am contacting you with regard to a research initiative we are supporting with the University of Portsmouth into the repatriation process. As a line manager to a recent repatriate we value your opinion and would like to recommend your participation in the study to discuss your experiences. The interviews will be conducted independently by Liza Howe-Walsh, a researcher from the University; all feedback will remain confidential and anonymous.

It is anticipated that interviews will last no longer than 30 minutes and will be conducted either face to face or via telephone. Interviews will be arranged as soon as possible. The feedback from the interviews will be used to assess the overall success of the current repatriation process and make potential recommendations for future repatriation processes and programmes.

The next step is to agree to participate at which point your contact details will be passed to Liza to arrange a mutually convenient time to talk. Participation is entirely voluntary and you may withdraw at any stage of the research.

If you would like any further details regarding the research please feel free to contact myself or Liza directly.

Your participation will be greatly appreciated and will assist our continuous improvement of International HR services.

Liza.howe-walsh@port.ac.uk
<http://www.port.ac.uk/departments/academic/hrmm/staff/title.38172,en.html>
Telephone: +44 2392 844051

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Table 1 : Demographic Profile of Sample

* Married whilst on assignment; Children born on assignment.

Code	Gender	Age Group	Education	Industry	Type of interview	No. of International Work experiences	Tenure	Length back from assignment	Married	Children
001	Male	30-39	Secondary	Banking	Telephone	0	10 years	8 months	Yes	1
002	Male	30-39	Secondary	Banking	Telephone	0	9 years	8.5 months	Yes*	1*
003	Male	30-39	Post Grad	Banking	Telephone	Multiple	13 years	5 months	Yes*	0
004	Female	30-39	Post Grad	Banking	Face to face	0	?	6 months	No	0
005	Male	30-39	Secondary	Banking	Telephone	0	7 years	6 months	No	0
006	Male	40-49	Graduate	Banking	Face to face	0	20 years	11 months	Yes	3
007	Female	40-49	Post Grad	Banking	Face to face	0	21 years	12 months	Yes	3
008	Male	40-49	Secondary	Banking	Telephone	0	7 years	4 months	Yes	2

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Table 2. Demographic Profile of HR function and Line Sample

Code	Gender	Age Group	Education	Industry	Type of interview	Current position	Tenure	Previous experience of assignments	Previous International assignment
0013	Female	50-59	Post Grad	Banking	Telephone	HRBP	20 years	Yes multi	Yes 1
0014	Female	30-39	Post Grad	Banking	Face to Face	HRBP	10 years	None	No
0015	Female	30-39	Secondary	Banking	Telephone	HRBP	2 years	Yes	No
0016	Male	40-49	Post Grad	Banking	Telephone	HRBP	4 years	Yes multi	Yes 1
0017	Female	30-39	Post Grad	Banking	Face to face	IHR Mgr	15 months	Yes multi	Yes 1
0018	Male	50-59	Post Grad	Banking	Telephone	Line Mgr	21 years	Yes	Yes 1
0019	Male	50-59	Secondary	Banking	Telephone	Line Mgr	32 years	Yes	

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Table 3. Summary of analysed themes

Cluster : 1 Repatriation Policy

Timing	‘State of Flux’	p1 line 11
Return position	‘No guaranteed job on your way back’	p2 line 4
Policy influence	‘Not thought about it’	p2 line 12
Tax issues	‘IHR tried to help’	p1 line 29, p3 line 3

Cluster : 2 External influences

Economic climate	‘Restructure’	p2 line 24
Partner and family support	‘No support’	p2 line 24

Cluster : 3 Commitment

Individual commitment	‘Great opportunity, as an individual you have to make a real commitment’	p1 line 8-10
Organisation commitment	‘Sacrifice from company point of view’	p2 line 12

Cluster : 4 Stakeholders

Repatriate	‘I was stuck in the middle’	p1 line 18
IHR	‘IHR had not business plan’	p1 line 6
HRBP	‘Tie up business and HR disconnect’	p3 line 9
Line manager	‘Business manager instigated move’	p1 line 15

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Table 4. Integration of Cases

Having produced summary tables for each individual participant, the researcher integrated the responses into inclusive master themes that reflect the participant's experiences outlined below in table 4.2:

Master theme: 1 Repatriation Policy

Timing	p1(12)	p1(10)	p1 (11)	p1(12)	p1(16)	p1(28)	p3(3,4)	p1(27-29)
Career path	p1(33-38)	p8(6-10)		p9 (9)	p3(25,44)	p2(6)	p2(14-18)	p2(24)
Tax issues	p3(6)	p3(10)p6(17)	p1(29), p3(3)	p2(19)	p3(4-10)			p4(27)
Return position	p1(30)	p4(23)p5(24)	p2 (4)	p1(30)	p2(23)	p2(6)	p9(4)	p1(33-38)
Policy influence	p2(4,27)	p2(4-7)	p2(2)	p4 (28-46)		p5(22)	p2(29)	p7(5,17)

Master theme: 2 External influences

Economic climate	p2(2)		p2 (24),	p5(34)	p2(10)	p1(44)	p9(8-9)	8(4,10)
Ptnr/family support	p3(4)	p2(11-23)	p2 (24)	N/A	N/A	p4(18)	p5(8-12)	p5(3,32)

Master theme: 3 Commitment

Ind commitment	p3(23)	p4(30-33)	p1(8-10)	p5(34)	p2(7)	p6(38)	p7(24-30)	p7(24)
Org commitment	p4(3)	p4(7-10)	p2(12)	p5 (20-38)	p2(9)	p7(25)	p7(8-9)	p7(44)

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Master theme: 4 Stakeholders

	<i>Repat 01</i>	<i>Repat 02</i>	<i>Repat03</i>	<i>Repat04</i>	<i>Repat05</i>	<i>Repat 06</i>	<i>Repat 07</i>	<i>Repat08</i>
Repatriate	p1(12-14)	p1(22-23)	p1(18)	p1(22)	p3(42-47)	p9(1-6)	p8(43)	p1(27-29)
IHR	p1(19)	p7(1-3)	p1(6)	p2(12)	p2(42)	p2(23)	p5(10-13)	p4(45)
HRBP	p2(17-19)	p1(29-30)	p3(9)	p1(22)	p3(40)	p3(34)	p5(30)	p1(43-44)
Line mgr	p2(24)	p1(12-18)		p3(35)	p2(33)	p4(18)	p4(31)	p3(32)

Self-initiated expatriation: Implications for HRM

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Self-initiated expatriation: Implications for HRM

Abstract

The decision of an employee to move from their home country in order to work in another country/culture will create a myriad of issues for the employees to face. Every year, many employees take the decision to migrate. So far the literature has focused on the motivation to expatriate, on the one hand, or Human Resource Management (HRM) for international assignments within an organisation, on the other hand. Little regard is paid to the opportunities HRM can play in supporting the adjustment of self-initiated expatriates to the new organisation and culture. The paper derives assumptions based on Black et al.'s model of adjustment to help self-initiated expatriates to adjust and reach their performance potential more quickly. We argue that organisations should consider whether their current practices enhance or hinder the successful employment of self-initiated expatriates. Besides work-related HRM practices, HRM for self-initiated expatriates should consider expanding support into non-work areas, such as supporting partner relocation or helping to find accommodation.

Self-initiated expatriation: Consequences for HRM

Introduction

Global migration is an increasing trend demonstrated by the willingness of Europeans to migrate within and beyond the continent for employment (Strack et al., 2007). It is unclear, however, in how far organisations are prepared for the challenge of managing foreign staff.

The management of talent has been highlighted as the most challenging issue facing employers in Europe going forward to 2015 (Strack et al 2007). Competition for talent is not just about competing locally but competing globally, thus raising issues for HR as to who to attract and how to retain such talent. Some countries and some organisations take HRM practices quite seriously when it comes to competing for talent on the global market. For example, there are international job advertisement sites where organisations can publicise themselves as an employer of choice to candidates

<http://www.addjobs.co.uk/jobboards/international/index.asp>). For organisations, it can be highly attractive to have international staff, especially as the competition between companies grows more and more internationally. Especially, in areas of skills shortages, the competition for talent is ever-increasing. Therefore, adopting an internationally focused HR strategy may enhance competitive advantage for the company. However, incorporating an international focus to HR practices at many organisations seems to be in its infancy. In order to attract and retain international staff and compete on the global talent market, HRM within organisations needs to become more purposeful and proactive. This paper will outline how research in other areas of expatriation can inform HRM in organisations and enhance good practice. While most research in the area has been conducted using international assignees, self-initiated expatriation has recently gained more attention (e.g., Jokinen, Brewster & Suutari, 2008). However, research in this area has considered self-initiated expatriates as a relatively homogenous group. We argue that there are two major differences within the groups of self-

initiated expatriates to be taken into account: While some expatriates leave their country to pursue a career in a different country, others leave for personal reasons, such as to follow a relationship or simply for the love of a specific country. The former will go abroad on the basis of a job offer, whereas the latter will not necessarily have a job when they arrive in the new country. In the case of expatriates coming to a new country because he/she was offered a job (we can then here “career expatriates”), organisations may be more or less aware of their specific needs for training and development. However, the expatriates arriving for personal reasons (called here “private expatriates”) and applying while already in the country will be considered similar to home nationals as their status as an expatriate will be more of a chance issue, rather than something the organisation is prepared for. In this theoretical contribution, we concentrate on adjustment and acculturation using the framework of Black, Mendenhall and Oddou (1991). Using a differentiation of expatriates based on their motivation to go abroad, we will differentiate which HR practices are more or less relevant for which type of self-initiated expatriate. This differentiation is very much in line with recent calls for differentiation in HR practices which acknowledges that HR practices do not affect all employees in the same way (for a recent example see Kinnie, Hutchinson, Purcell, Rayton & Swart, 2005). Our aim is to advancing knowledge to inform HR practices by providing a research agenda and developing propositions.

Expatriation: Some numbers

Research into expatriates has mainly focused on employees sent on assignments by their company (Richardson & Mallon, 2005; Suutari & Brewster, 2000). However, self-initiated expatriation where an individual achieves employment outside their home country is an equally important topic. Although absolute numbers for self-initiated expatriation are not available, evidence for the significance of self-initiated expatriation can be found. According

to the Institute for Public Policy Research 5.5 million British citizens live abroad (Sriskandarajah & Drew, 2006, see also Guardian weekend from the 27-01-07). The UK Office for National Statistics states that “in 2002, 125,000 people migrated from the UK to the European Union (EU), compared with 89,000 who migrated from the EU to the UK. This gives a net outflow of 36,000 to the EU” (Office for National Statistics, 2005), indicating the importance of migration within the EU.

Indirect evidence for the prevalence of self-initiated expatriation comes from a study on international assignments by Riusala and Suutari (2000) who contacted 1,100 expatriates. Of the 448 returned questionnaires, 147 (32.8 percent) had to be excluded because they came from self-initiated expatriates. As far as EU citizens are concerned, the ongoing expansion of the EU has offered its citizens many possibilities: rather than having to focus on their home labour market, Europeans are free to live and work all over Europe (see Article 39 of the treaty establishing the European Community (treaty of Rome), European Union, 1957). With the Schengen-Treaty ratified in 1985, borders, as far as labour mobility is concerned, became largely a thing of the past within the EU (European Union, 2000). This means that migration has become quite easy within the EU and the regulations will enhance migration even further.

Self-initiated expatriates: Definition and differentiation

We define self-initiated expatriates in this paper as employees who decide to migrate to another country for work. For our theoretical analyses, however, we will, focus on self-initiated expatriates who give up their position in their home country prior to migration, rather than those on a career break spent abroad. Self-initiated expatriates initiate their expatriation and find a position in another country by themselves.

As mentioned earlier, a large amount of the prior literature on expatriates has focused on employees undertaking international assignments. These two groups of expatriates can be

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contrasted to each other. Employees on international assignments have a job arranged for them by their company before they leave their home organisation. In contrast to self-initiated expatriates, employees on international assignments usually receive training prior to leaving for assignment. In addition, a typical package for international assignees can include culture and language training as well a compensation package that takes into account educational benefits for children, rental supplements etc. (Peterson, Napier & Shim, 1996, PricewaterhouseCoopers, 2005). The job of an employee on an international assignment is usually restricted in its time perspective, anything from 3 months to 5 years. The time perspective for self-initiated expatriate is less clear. Excluding career breaks here, self-initiated expatriates can plan to stay for a period of time or for good but this will usually not be predetermined. See table 1 for an overview of differences between self-initiated expatriates and employees on international assignments.

Table 1: Overview of differences between self-initiated expatriates and employees on international assignments

	Self-initiated expatriates	International assignees
Initiation	Self	Company
Pre departure preparation, training etc.	Self	Company
Time-perspective	No limit	Limited
Job secured prior to expatriation?	Yes or No	Yes
Compensation package	No	Yes
Support in non-work issues	No	Yes

In terms of HRM and employee needs, another group from which to differentiate self-initiated expatriates are other organisational newcomers with prior job experience. The reason

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for this is the different levels of knowledge that self-initiated expatriates and organisational newcomers bring to their new workplace. Whereas the organisational culture prevalent at their new workplace is unknown to both self-initiated expatriates and organisational newcomers, the latter are familiar with the country's culture. Both self-initiated expatriates and organisational newcomers will know the characteristics of the job from prior experience and will not know the specific job characteristics of the position they are just starting. The organisational newcomer, in contrast to the self-initiated expatriate, may, however, know what the position comprises of on a country level (e.g., the hours of work), even if the specifics vary between organisations and on different levels of the job. Table 2 provides an overview of the differences between initiated expatriates and organisational newcomers.

Table 2: Overview of differences between self-initiated expatriates and employees on organisational newcomers

	Self-initiated expatriates	Newcomers
Country culture	Unknown	Known
Organisational culture	Unknown	Unknown
Job characteristics (general)	Known	Known
Job characteristics (country level)	Unknown	Known
Job characteristics (organisation)	Unknown	Unknown

Self-initiated expatriates: Motivation to go abroad

Motivation to go abroad and work can differ considerably. While some expatriates go abroad to start a new job and maybe enhance their career, others may have been actively recruited by

organisations that cannot find a specific skill locally. Additionally, others expatriate for personal reasons, including love for a specific country or to pursue a romantic relationship. Although at first glance, the motivation for expatriation may seem to be less relevant for HR practices, we will argue in the following that it is very relevant indeed.

Expatriates differ regarding the question whether or not they prepared a job for themselves before going abroad. In terms of HR practices, this differentiation is relevant for several reasons. For example, expatriates that have applied for a job and move abroad to take up that position will probably be more prepared for the job related aspects of their move, though maybe not for the intercultural challenges. On the other hand, expatriates who move to a certain country because of the country rather than the job may be more prepared for intercultural challenges than for the challenges involved in starting a new job abroad. In addition to the differences within the group of expatriates, the company involved may have more or less interest in a successful acculturation, depending on whether they particularly wanted the expatriate prior to expatriation and, consequently, spend more effort in helping the expatriate to adjust. Expatriates that live in the country before applying for a job, in contrast, may be considered more equally to other (home) applicants. This interest of the organisation in the expatriate will differ considerably depending on the local labour market. If the labour market is characterised by skill shortage, organisations usually have more interest in the successful adjustment of the expatriate. We can assume that the source of support may differ considerably depending on the expatriates situation and the situation of the local labour market. In the following, we will review prior research on self-initiated expatriates and international assignees in order to derive propositions for HR practices relating to self-initiated expatriates. We will then differentiate these hypotheses on the basis of our differentiation of self-initiated expatriates introduced above.

Self-initiated expatriation and career

Self-initiated expatriation can be regarded in the context of modern careers where individuals manage their own careers (e.g., the boundaryless or the Protean career, see Inkson, 2006, or the global boundaryless career, Carr, Inkson & Thorn, 2005). The protean career concept was introduced by Hall (1996) who claimed that careers in the 21st century are “... driven by the person, not the organization, and [careers] will be reinvented by the person from time to time, as the person and the environment change.” (p. 8). This statement is certainly valid for self-initiated expatriates (see also Baruch & Hall, 2004). This is underlined when looking into the reasons for migration: According to Carr et al. (2005), there are five main reasons for migration: Economic factors, political factors, cultural factors (such as the choice of a similar culture but in a country with greater economic possibilities), family factors (e.g., family reunion), and career factors (such as professional development). From interviews among 30 British expatriate academics, Richardson and McKenna (2002) derived four metaphors for reasons for leaving: explorer; refugee; mercenary; and architect. Three of those, namely, the explorer, the mercenary and the architect leave their country in order to gain something in the other country (interesting experience, financial rewards or career-building, respectively). “A refugee” is mostly interested in leaving the country he/she presently works in. Similar to the explorer metaphor, Richardson and Mallon (2005) report those topics in connection to self-directed migration of academics include desire for adventure and new experience. Presuming, these reasons will be similar for other self-initiated expatriates, especially knowledge workers. This is supported by Hall (2005). He analysed migration among high-skilled knowledge workers in general and concludes that besides pay issues, the possibility to “pursue problems that interest them” (p. 948) is most important for high-skilled knowledge workers.

International assignees may volunteer for an assignment abroad but are operating within the career development opportunities of their company. The responsibility for the

employee's career consequently is more in the hands of the company than the individual. Hall and Moss (1998) call for a relational approach that companies should take towards their employees' careers where employers provide opportunities, rather than manage employees' careers. As Selmer (1999) puts it, the responsibility for career development lies both with the individual and the organization. In the case of self-initiated expatriation, although individual expatriates have taken responsibility for their career to a great extent, the company which employs them still has a duty to contribute to their development. As is obvious from the above cited literature, much research has focused on expatriation as driven by one's career or professional interest. However, this definition of self-initiated expatriation only applies to self-initiated expatriates that go abroad to take up a job and not for those that expatriate for personal reasons. The latter seems to be an under-researched group in the expatriation literature.

Self-initiated expatriation and HRM

Whilst one can argue quite easily for the need of HRM initiatives for self-initiated expatriates from the perspective of their personal well-being, the question may arise why HRM for self-initiated expatriates is important to organisations, especially if the expatriate was not "invited" to come and join the organisation from abroad but applied while already in the country. One could argue that if an individual decides to expatriate, his or her adjustment and acculturation is his or her own responsibility. However, in order to gain advantage from self-initiated expatriates, organisations must try to smooth the transfer from one country to another. As Ayman (1997) puts it: "Organizational assistance reduces the time the expatriate has to spend on these issues and facilitates adjustment to the new work setting" (p. 445). Consequently, professional HRM policies and practices can assist the expatriate to perform at the expected standard from early on. HRM can become a unique selling point for the individual

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organisation in the competition for global talent. An example is developing an employer brand that is communicated internally and externally and, crucially, during the recruitment process to attract talent (Glen, 2006).

In terms of international assignments, HR management can focus on two parts of the process: support prior to leaving and support on-site (Suutari & Burch, 2001). Mostly, research has focused on training expatriates in their home country (e.g., Waxin & Panaccio, 2005). With respect to self-initiated expatriates, the receiving company cannot support expatriates prior to their emigration. That means that HRM in this case has to focus on supporting expatriates in their host country. In other words, the focus of HRM is on the adjustment of expatriates after expatriation has commenced.

Adjustment to the new culture or acculturation works in four stages (Black, 1988): The “honeymoon” stage, a frustration stage, and a stage where some new behaviours have been adopted. In the fourth stage, adjustment is complete (see also Hofstede, 2001). According to Hofstede (2001), three different results of acculturation can be differentiated: (a) Continue to feel alien and discriminated against, (b) bicultural adaptation, and (c) going native. Only the latter two can be described as successful acculturation.

Black and colleagues (e.g., Black, 1988; Black et al., 1991) introduced probably the most elaborate model of adjustment. They differentiate between three types of in-country adjustment, namely, (a) work adjustment, (b) adjustment to interaction with host nationals, and (c) adjustment to general environment (p. 304). In addition, according to Black (1988), adjustment can be subjective or objective. Subjective adjustment describes how comfortable expatriates feel in their new role. Objective adjustment refers to the mastery of role requirements and performance. Combining these two different approaches leads to a three x two table of adjustment requirements that an expatriate is to achieve (see Table 3). The best result for an expatriate and his/her employer would, of course, be successful adjustment with

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respect to all facets. Table 3 points out some possible results of expatriates subjective and objective work adjustment, interaction adjustment, and general adjustment, respectively.

Table 3: Facets of adjustment

	Work adjustment	Interaction adjustment	General adjustment
Subjective adjustment	Job satisfaction	Feeling at ease in interactions	Not feeling alien
Objective adjustment	Performance	Cooperation with home nationals	Accommodation, social life

As self-initiated expatriates cannot be prepared by their host country's company prior to their expatriation, anticipatory adjustment, as Black et al. (1991) call it, cannot be provided by the employer is up to the expatriate him-/herself. With respect to adjustment in the host-country, Black et al. (1991) distinguish between individual, job, organisational culture and non-work factors influencing adjustment. Individual adjustment refers to self-efficacy and skills (relation, perception). Job antecedents include role clarity, role discretion, role novelty, and role conflict. Organisational antecedents comprise organisation culture novelty, social support, and logistic help. Non-work factors include culture novelty and family-spouse adjustment (Black et al., 1991, p. 303). However, as anticipatory adjustment cannot be expected to have taken place, tasks that would otherwise have been dealt with prior to expatriation will be on the agenda after arrival in the host-country. In terms of HRM, the fact that the expatriate will arrive without prior preparation by the company will put more emphasis on the selection process and therefore the individual antecedents of adjustment. In the following, we will outline propositions for HR support for successful expatriate adjustment. We will concentrate on objective adjustment as this is the type of adjustment that HR can probably influence the most and that is also easier to control in terms of successful

adjustment. However, in a later part of this paper, we will outline how HR support can influence the individual's effort for subjective adjustment.

Selection

Black et al. subsume self-efficacy, relation skills and perception skills under individual antecedents of adjustment. In research about international assignments, one factor that often emerges as a key factor in the failure of international assignments is the selection on the basis of technical rather than intercultural skills (Black and Gregersen, 2007; Harris & Brewster, 1999). While employees on international assignment can be prepared for their future intercultural encounter, this is not possible (at least it is not possible for the organisation) in the case of self-initiated expatriates. In order to be able to 'fit in' and interact successfully with host nationals, it is therefore preferable for self-initiated expatriates to possess good cross cultural skills prior to starting their new position, or, as Tharenou (2003) suggests possess receptivity to working abroad. Harris, Brewster and Sparrow (2003) concur that expatriates essentially should possess soft skills. This may be quite difficult to assess, especially if the future employer wants to avoid treating the expatriate differently from a 'home' applicant. Prior work experience, however, may include working with colleagues from different countries. Consequently, this type of cooperation can serve as a clue for interpersonal and cross-cultural skills.

Similar to success and failure in international assignments (Larson, 2006), another factor that will influence the success of self-initiated expatriates is prior foreign experience. This again is quite easy to assess from a CV, without the need to put the potential expatriate through additional selection processes beyond those that all applicants have to undergo.

Taking into consideration, the motivation to go abroad, we can assume that expatriates who migrated for private reasons may already be familiar with the countries culture as they

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are living in the country and have made the choice for a specific country rather than a specific position. Therefore, the question whether or not they possess soft skills will be less relevant. However, a different issue will be to assess their qualifications. As they want to be in the country for personal reasons, it is quite possible that they are willing to accept a position that has a low fit with their prior work experience.

Whereas one may consider selection to relate to the organisations ability to practice effective selection strategies for self-imitated expatriates, there is also the issue of how candidates select the organisation. In contrast to an assignment, the self-initiated expatriate chooses the organisation he/she wants to work for. Therefore, HR interventions can play a vital role in developing their organisation as an employer of choice. Thus, positively engaging with potential candidates is arguably as important as the actual formal selection process.

Proposition 1a: With respect to “career expatriates”, prior cooperation with colleagues from different countries and prior foreign experience serve as an indicator in interpersonal and cross-cultural skills. Self-initiated expatriates who have cooperated with colleagues from different countries and/or have prior foreign experience will more easily adapt to their host countries than others who have not cooperated with colleagues from different countries or have prior foreign experience. Self-selection plays a role in the selection process.

Proposition 1b: With respect to “private expatriates”, social skills can be taken more for granted but technical skills will need closer examination.

Definition of position

Black et al. (1991) include role clarity, role discretion, role novelty, and role conflict in their antecedents of in-country adjustment. For self-initiated “career expatriates” one’s first thought

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may be that nothing much changes, for example, an accountancy role or academic position in the UK will have a combination of work activities which are broadly similar in most countries. However, the actual work-load and context may be very varied in different countries. Even if the self-initiated expatriate remains in their preferred field of work, there can be variations in the role requirement which comprise tacit assumptions about cooperation that may be very different in different countries. A 'home' national will most probably be aware of this tacit assumptions but a self-initiated expatriate will need more information and support in understanding the expectations. However, "private expatriates" may need more support in adjusting to the work role as their position may differ from their prior work experience. Thus, it is even more vital to them with an accurate picture of the organisation's expectation toward them.

Proposition 2: In addressing job-related antecedents of adjustment, giving a clear definition of a position will have a positive effect on self-initiated expatriate work adjustment. This will be especially true for "private expatriates".

Mentoring

Probably the most important point to address for the expatriate is cross-cultural awareness. Research into cross-cultural training has shown that such training is generally effective in terms of expatriate adjustment (Black & Mendenhall, 1990; Waxin & Panaccio, 2005). Referring to Brislin (1979), Waxin and Panaccio (2005) differentiate three methods of cross-cultural training, namely, cognitive, affective and behavioural (p. 52). This links in with the three facets of cultural intelligence that Early and Ang (2003) distinguish, that is, the cognitive, the motivational and the behavioural facet (p. 67). This differentiation highlights the fact that expatriates need not only to know what is the right behaviour in a different

culture, they also need to be motivated to show that behaviour and, maybe most important of all, be able to demonstrate it. Given the clear benefits cross-cultural training can have during adjustment (Waxin & Panaccio, 2005), the host country HR can ensure that such training is facilitated.

However, in order to enhance interaction adjustment while at work, organisations can use other options, such as providing a mentoring system or using co- working systems. These techniques provide direct learning possibilities and opportunities to clarify questions while working on a specific task and will therefore support especially interaction adjustment. We can assume that this is less relevant for “private expatriates”. However, though they are familiar with the culture of their country of choice, they may still need to be advised on business practices. We therefore assume that both types of expatriates benefit from mentoring.

Proposition 3: At work support such as mentoring and co-working enhances interaction adjustment for self-initiated expatriates.

Non-work-related aspects HR

Dealing with non-work-related issues is a feature of HRM that is more relevant to expatriate HR practices rather than home HR practices. Other non-work-related factors can be derived from Suutari and Burch (2001): In their study regarding on-site training and support for international assignees, Suutari and Burch (2001, table 3) derive eleven support practices from their interviews: arrival and reception; accommodation; shopping/banks; transportation; public authorities; local laws/rules; health care system; schools/day care; free time possibilities; partner work arrangements; and family social activities. Shaffer and Harrison (1998) examined the effect of work, non-work and family influences on work and non-work satisfaction of expatriates. Partner adjustment and partner satisfaction influenced expatriate

non-work satisfaction. Also, partner adjustment and living conditions had an impact on interaction and cultural adjustment. Although these results are based on research on international assignees, it makes obvious the wider HRM needs of expatriates as opposed to home nationals. Shaffer and Harrison (1998) mention four HRM aspects related to partners: job search assistance; assistance with obtaining work permits/ visas; continuing education; and allowances for professional seminars and conferences. This research indicates that there is a clear need for HRM practices to switch focus from the expatriate employee only to including partner issues (see also recommendations by Richardson & Zikic, 2007).

Coming to a new country often sets challenges in very practical terms. These may include taxation and custom and excise issues (see Baruch, Steele & Quantrill, 2002, for an example of a company providing support for taxation issues). Finding out about the rules and regulations in other countries can take a while and will prevent the expatriates from performing effectively in the first stage of expatriation, if only because he or she will be off work to organise these practicalities. Therefore, support from HR can ease the transition for an expatriate.

In Baruch's et al. (2002) study, accommodation was among the four most important motivators for single expatriates for expatriation. Whereas accommodation may not serve as a motivator for all expatriates, finding a place to stay can be quite stressful, especially when the expatriate does not speak the local language or is not familiar with the local rules and regulations. Especially, when an expatriate migrates for the job, HR can in this case facilitate help in finding accommodation and helping with the legal issues involved.

According to Suutari and Burch (2001), the use of network possibilities, whether formal or informal, is advisable for companies, maybe especially during the first stages of expatriation. HR initiatives to develop informal networks or communities may help the transition and give support to better integration and adjustment. However, all these more

practical issues will be less relevant for the “private expatriate”. They will have found accommodation and arranged the necessary papers before starting a new position.

Partner/spouse matters will be, of course, least relevant for those who came to the country to live with a local partner.

Proposition 4: Addressing non-work-related antecedents of adjustment, such as intercultural training, family adjustment and practical issues will have a positive effect on self-initiated expatriate adjustment. This will not be relevant for “private expatriates”.

Objective and subjective adjustment: HR support and reciprocity

So far, we have argued for the influence of HR support on different facets of objective adjustment. Subjective adjustment, in contrast, will be more related to the expatriates own attitudes and efforts. For successful expatriation this means that both the organisation and individual have to join their efforts. However, organisational and individual efforts are not independent as recent research by De Vos, Dewettinck and Buyen (in press) on career self-management and organisational career management and their joint effect on organisational commitment suggests. In terms of employment contract and reciprocity, one can expect that the more an organisation invests into an expatriate’s adjustment, the more he/she will engage in adjustment effort as well. If, however, the expatriate does not perceive support in adjustment efforts, he/she may feel that it is not worth putting effort into adjustment him/herself and, consequently, will rather tend to look for a position in a different organisation or even a different country.

Proposition 5: HR support for adjustment is positively related to self-initiated expatriate's own effort with respect to adjustment. HR support and individual efforts together lead to successful overall adjustment.

Discussion, limitations, future research, and conclusion

From the lack of literature in this area, we may conclude that few companies actively and systematically engage in expatriate HRM when dealing with self-initiated expatriates. Using Baruch and Altman's (2002) taxonomy of corporative expatriation and repatriation practices, one may assume that with respect to HRM for self-initiated expatriates most companies fall under the category of expedient organisations: their approach to HRM of self-initiated expatriates will be ad-hoc and pragmatic rather than following an embedded HRM policy. To put it again in Baruch and Altman's (2002) words: they are merely managing chaos (p. 252).

Taking into account different aspects of adjustment, we derived a set of propositions for successful self-initiated expatriate adjustment. Our theoretical review took Black et al.'s (1991) model as a starting point to derive assumptions on which factors can help self-initiated expatriates to adjust better to their work, interaction and environment. Figure 1 provides a summary of our propositions regarding how different HR practices influence different types of adjustment. We argue that for the different types of adjustment, different HR practices are more relevant. We initially focused on objective adjustment as subjective adjustment is difficult to evaluate for HR, on the one hand, and difficult to influence, on the other hand. However, joint efforts for adjustment are necessary to achieve successful adjustment. On the basis of reciprocity, we expect that HR support stimulates the self-initiated expatriate's own effort for adjustment, ultimately leading to successful adjustment.

Engaging in HRM can positively affect organisations in several domains. First, a good recruitment strategy can give them a strategic advantage over other companies in that they

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will be able to attract good candidates, thus, combating the growing challenge of managing talent. Second, training and mentoring as well as support in non-work issues will render organisations' international staff effective in a shorter period of time than when these issues are not taken into account. Taking into account the different motives for employees to expatriate, can help to choose HR practices that are relevant for the adjustment of the individual. In the context of international assignments, Dickmann, Doherty, Mills and Brewster (2008) recently found a marked difference between the reasons expatriates give for accepting an assignment and the reasons that organisations believe are relevant in this context. This highlights that an analysis of the needs of the individual expatriate, taking into account his/her individual background can help to choose the right HR practice to ensure successful adjustment and retention. Offering different types of support to choose from is one way forward that organisations should consider. Given that line managers are more and more on the fore-front of HR (Perry & Kulik, 2008) and that they are considered vital for the success of HR policies (Purcell & Hutchinson, 2007), the possibilities for support should be pointed out to the relevant line manager who can then pick and choose together with the expatriate and find the most appropriate support.

Our analysis of HRM for self-initiated expatriates is entirely theoretical. We did not conduct a study into the actual international HR practices in organisations. These may be quite different between organisations and between countries. Indeed the debate regarding HR practices and academic theory are duly noted as a raft of scholars acknowledge that academic theory and actual evidence based practice of HR activities vary greatly (Cascio, 2007; Guest, 2007; Latham, 2007; Lawler, 2007; Rynes, 2007; Giluk & Brown, 2007; Rousseau, 2007; Saari, 2007). While we were aiming at general propositions for HRM for self-initiated expatriates, an analysis of the actual practices would provide us with knowledge about the possible gaps to be filled by organisations' HR practices. Similar to Tung's (1987)

comparison of the management of international assignments in different countries, future research could focus on the differences between organisations in different countries and how they approach the management of expatriates. Especially combining this analysis with recruitment and retention numbers would further our insight into the HRM of self-initiated expatriates.

Our theoretical analysis focused on self-initiated expatriates. While our propositions maybe generalisable as far as larger companies are concerned, many self-initiated expatriates will work in small or medium size companies that may not even have an HR department. However, some of our propositions can be emulated by expatriate networks that may be utilised by employer organisations in order to maximise expatriates' well-being and performance even in very small enterprises. Increasing globalisation places emphasis on employers to utilise HR interventions to enhance their selection of candidates and increase their competitive advantage over other organisations in the growing competition for global talent. So, while in some countries skill shortage already forces companies to engage positively with expatriates and even actively recruit abroad, we argue that the HR practices outlined here will be beneficial for all companies that employ expatriates.

Although we have differentiated between two types of self-initiated expatriates, many more types exist. For example, we have not taken into account entrepreneurs who go abroad to start a new business, either in their current business area or a totally new type of business. Entrepreneurs are, of course, not members of organisations and thus cannot be reached by HR practices. Nevertheless, support can be given on a country level, for example, as far as legal issues, language or cultural differences are concerned. This would support these expatriates' chances of successful integration.

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